

The Information Professional as Personal Shopper: How You Can Add Value in Your Organization as a Strategic Information Consultant

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Abstract

End users are increasingly searching for information themselves, a trend that is pushing the information professional's role to the periphery of the organization. Information professionals no longer fill the traditional role of information gatekeeper, leading some organizations to question the value of these professionals. The Special Library Association's (SLA) "Competencies for the 21st Century" implies a new mental construct, one in which information professionals play a central role in meeting organizations' most critical goals. To achieve that mental construct, we need to develop a new framework that positions the information professional as a strategic information consultant that is integral to the information workflows and decision making of an organization.

Introduction

Librarianship today is commonly held to be in crisis. SLA is struggling to redefine itself, examining both its name and values. Elementary school children quickly learn to use free web search engines like Google to find information, both for homework and video game tips. Searching for information, once synonymous with being a librarian is now performed by anyone with access to the Internet. In this context where anyone can search, information professionals face a growing false perception problem that devalues their competencies and limits the crucial role they play within their organizations. The traditional perception of information professionals often creates a barrier between the library and the value they can bring to the rest of the organization.

Despite this perception problem, information professionals continue to add value to their respective organizations. In fact, the skills of the information professional are more valuable and more necessary than ever, as organizations deal with information overload. Information professionals can bring calm and order to information chaos. But information professionals must strive to shift this negative perception of their skills and position themselves as information leaders.

In his book, "Ambient Findability," Peter Morville, president and founder of Semantic Studios, an information architecture, user experience, and findability consultancy, notes that "End users have access to an abundance of information, and are mistaking this abundance for being well informed." End users and decision makers need someone to help them navigate through the

volumes of information for the precise information that will add value to the organization and help make decision making easier and quicker.

Information professionals have the unique skills necessary to lead organization-wide information management initiatives. To transform perceptions of their vocation, information professionals must bring their skills out of the library and become engaged in the processes and activities of the wider organization. By doing so, information professionals will prove their value and show why organizations need information professionals.

Reversing Current Information Trends

Four recurring themes are being expressed by a growing number of information professionals. The first, and perhaps most pervasive, is that advanced search skills are often considered archaic by end users, and that an information professional's skills are no longer considered to be specialized – all that is left of librarianship is a rotation on the reference desk. Secondly, management generally does not understand the value the library brings to the organization, nor do they understand how information professionals can provide new ways to further management's goals. Another common refrain is that many new information trends are too technical, and "sound like programming, not librarianship." Finally, corporate, government, and public libraries are in a continuous state of being closed – a clear statement that in some communities the library's operational costs are perceived as outweighing the value provided.

These trends are alarming, but they can be reversed with the right strategy. Information professionals have the perfect combination of training and competencies to be an integral part of a high functioning, highly profitable (or valuable, for non-profits) organization. They know how to determine the information needs of their organizations, where and how to find the right information, how to assess the information they find, and how to store information so that it can be retrieved later.

In 2003, SLA published "Competencies for Information Professionals of the 21st Century," which positions information professionals as leaders within their organizations, lighting the way and bringing order to the chaos. However, there continues to be a great cry among many organizations that they don't know what they know. As former Hewlett-Packard CEO Lew Platt once exclaimed, "If HP knew what HP knows, we would be three times more profitable" (Davenport, 2003). Enterprises are still struggling to find their own internal information, let alone appropriate external information. It's just these problems that information professionals can help organizations manage, yet these professionals continue to operate on the periphery of many organizations. The time for leadership is now.

Information professionals are not presently sitting at the head of the table, leading organization-wide information management initiatives, and providing the necessary guidance on information management, as they should be. These activities are generally led by representatives from Information Technology groups. Information professionals have the training and skills to play a powerful role in the success of their enterprises if they live the vision embodied in SLA's competencies. Perhaps its time for a new mental construct as a way to revolutionize the thinking of information professionals and the organizations they serve.

It should be noted that numerous information professionals are truly leading information management within their organizations, and it is these people who embody SLA's competencies by driving innovation and offering tremendous value. Every area of an organization can benefit, directly or indirectly, from the helping hand of a librarian. Information professionals need only open their creativity for how to further invest in their organizations if they are not already fully invested.

Partners in the Quest for Information

What are the core skills of information professionals? Think back to the original library at Alexandria. In ancient times, a librarian would catalog papyrus scrolls and store them in a room on a shelf. When a scholar requested a particular record, the librarian knew exactly where to find that scroll of Ovid's, and how close it was to Homer's. This was a critical service to the learned, and it made the librarian, the information organizer and locator, a highly valued partner in the quest for information." Somewhere in the past decade the focus has moved from classic competencies in organizing information for retrieval to searching the digital world of unstructured information to find some hits. Emphasis has shifted from quality to quantity, and anyone can publish anything.

Finding hits is no longer a challenge, but finding answers remains as elusive as ever. Information literacy is still important, as users make important, maybe life-changing decisions, based on the data they happen upon. Information professionals have the skills necessary to overcome their organization's information overload. What is needed is for information professionals to change perceptions about the value they offer, and to organize the information so it can be found consistently and reliably.

Knowing Information Needs of the Organization

Information professionals must know their organization's macro information needs and be prepared to fill those needs. The challenge is to become integral to the information workflow collaborate with all departments. The next step is to lead the charge for information literacy and empowering end users with the ability to select the appropriate information sources for their specific needs.

More enterprises are just now discovering the many information silos they have. In some cases, these silos represent money wasted, as one group has information that another needs to successfully meet enterprise goals. Perhaps both groups purchase the same information twice, thus reducing economies of scale.

The key is for information professionals to provide the tools and leadership to manage internal knowledge and know when external information is needed. For example, if information is available in a certain silo, but key personnel are unaware of it, then it requires the second group to re-create. Or, a team spends time trying to locate information easily accessed in the next building over. "We know it's there somewhere, but we can't find it!"

Cataloging and archiving information and locating information sources have long been within the domain of the librarian. Increasingly, however, information held within an organization has management, legal, and financial implications, driven by Sarbanes-Oxley regulations in the United States and by Basel II financial records management requirements being developed in the European Union. Enterprise information is now a key resource in risk management. Corporate scandals in recent years have made it critical for enterprises to explicitly state policies and best practices on handling information. In Microsoft's antitrust lawsuit, the case was made worse by emails from insiders stating outright the anti-competitive intention. Enron's fraud with recovered memos showing intent was further complicated by late night document shredding sessions.

Organizations have two main classes of customers — internal and external. Organizations usually explicitly state who their most valuable external customers are. But internal customers are often only tacitly understood. With libraries there is another, high-value customer—senior management. Senior management often does not interact directly with the library. However, they do set budgets. And, senior managers do have their own, unique information needs.

Senior management is charged with determining strategy and executing it, to achieve the best results possible with the organization's resources. Now more than ever, senior management needs individuals with the competencies to identify appropriate information, catalog it and store it for later retrieval. Stand strong in your bailiwick – you are the expert in this domain. Now educate others in your organization about what you can do for them. Interview your senior managers to find out what their most pressing information needs are, and then meet those needs.

Organizations often ask information professionals to track market forces, particularly competitors and threats they present. You can extend the value you offer by looking for opportunities (e.g., mergers and acquisitions, licensing, partnering/alliances), and knowing your organization's strengths and weaknesses better.

Senior management is often asked to make substantial investments in new IT initiatives. These are often funded, because the initiatives sound like they will completely solve a pressing management issue. They carry the prestige of being modern solutions and promote an image of innovation. Between the excitement of the possibilities, and the fears of consequences of not implementing, senior managers often make these investments, and then later regret them.

Over the years we have seen a cycle to new information systems, as illustrated by trends like Y2K, Knowledge Management, Intranets, Extranets, Portals, e-Commerce, and so on:

1. Cutting edge system is released to the market with some demonstration of a gain in competitive advantage for adopters
2. Other organizations decide to implement the same system, to gain similar advantages and to keep up with technical developments, but do not adequately identify how the system addresses an information need or workflow problem
3. Mass disillusionment ensues as solutions prove to be more expensive than anticipated, while offering fewer benefits. The new system often does not fit all the organization's needs, and often doesn't fit the organization's culture

4. Masses of publications decrying the system as a waste of resources, and the system drops off the collective radar
5. Moderate rebound as organizations re-examine the system's actual benefits, and customize the system to optimize those benefits
6. Seek content to populate the solution and obtain value

Information professionals have the opportunity to make truly strategic contributions to their organization, which helps improve the results of work done by everyone else in the organization. Senior management needs continuous support and information for existing decision support systems (DSS). In addition to having a broader reach and result within the organization as a whole, the information professional and library benefit. No longer are library services just costs, but rather critical investments in the organization's ability to make decisions. Adding a high degree of value earns you an ongoing place within your organization.

Risk Management and Organizational Strategy

At a session on "ERM Emerging Trends and Expectations," Dr. Paul Walker, Professor of Accounting at the University of Virginia, noted that even senior management doesn't know where to assign ownership of new management processes. He related an incident from a visit to Microsoft several years ago, where he met with both the strategy and finance staffs, to review plans and assess risk for an enterprise risk management process. The financial staff initially claimed ownership of the process, saying that all risks were, at heart, financial in their nature and impact. The strategy team was quick with a rebuttal, and noted that the process was strategic, because "if we don't do Y, there won't be any finances!"

Large organizations no longer know customers and markets personally any more, so now they have to deliberately seek out and study this information. Enterprise risk management requires management know the organization's "big picture". To determine the big picture requires standardized data collection across the organization, and requires an immense amount of business knowledge. A well rounded information professional can offer a great deal of assistance with this new area.

Skills including common data formats, reference interviewing, and search skills allow information professionals to serve management and meet an important information need. Since Sarbanes-Oxley makes management legally responsible for information accuracy, information quality and accuracy is extremely important. It doesn't get more high value than this.

Innovation Management

Information professionals also can contribute to a company's growth through innovation management. Organizations are struggling to be profitable and find opportunities for growth. Innovation is an engine for such growth. A Product Development and Management Association (PDMA) Foundation time series study in 2004 found that the most profitable companies were those who did not make major funding cuts to innovation during the economic downturn in 2002-2003, supporting the saying that "You can't shrink your way to growth."

IBM has a “Think Place,” an online collaborative community for managing new ideas and product concepts (Hamm, 2006). Any IBM employee can put in an idea, which anyone else can see, comment on, add to, even rate for quality. Corporate “innovation catalysts” are staff that review ideas in the Think Place, and put together an exploratory group if there is sufficient interest. IBM funds several “spin-in” businesses every year, to provide fertile ground for concept development. Information professionals here can step up as innovation catalysts – search expertise in technical content, and determination of market opportunities, would be valuable contributions in assessing ideas, and making “go/no go” decisions.

Large companies outsource risk through partnerships, and mergers and acquisitions activities, in-licensing key technologies. In the pharmaceutical industry, large pharmaceutical companies’ pipelines are almost universally empty of new drug entities. Often legal staff perform strategic review, perform due diligence searches on potential targets, and make recommendations for candidates. Information professionals have the skills and access to proprietary content to help manage this process.

Product lifecycle time is speeding up. Companies must develop more new product concepts faster, evaluate them for viability, initiate projects, determine revenue forecasts, test, develop marketing collateral, release, and sell products faster than ever. Information professionals, who are expert searchers, can find critical information faster than end users. Their advanced search skills are necessary for today’s faster lifecycles. Alternatively, the project lifecycle slows down, and your company falls behind.

High Value Service: The Personal Shopper Construct

Today’s information professional has the opportunity to be their enterprise’s personal shopper. You might be familiar with personal shoppers in the context of the retail industry. A personal shopper is a consultant who works for a large store or who can be hired independently. This person is very well paid for making others’ lives easier. The personal shopper starts with a thorough “needs interview,” including the customer’s goals, preferences, and budget, and then uses their subject matter expertise to retrieve and bring back to the customer a small selection of highly relevant products for review and final selection.

In addition to personal shoppers, stores also employ store buyers. Buyers anticipate what the target market will want. Purchasing is often done six to eight months in advance of the season in which the merchandise will be offered to the market. No customer likes every item, and if merchandise is particularly trendy it may suit few shoppers when put on display.

Why would a store hire personal shoppers in addition to buyers? Many customers are willing to visit store after store and prefer to shop for themselves. But some people would rather use their time for other endeavors. Additionally, some customers lack confidence in their knowledge of quality and suitability – they recognize that they are not subject matter experts, nor do they wish to be. Rather, they want high-quality results without the minutiae. For these people, a personal shopper with subject matter expertise is worth their weight in gold.

Whereas the store buyer purchases for one-to-many, the personal shopper is skilled at one-to-one mass customization. The personal shopper has access to all the merchandise brought in by the store buyer, but recognizes that Customer A is only interested in offerings that meet his exact size, need, and taste. A skilled personal shopper filters out the irrelevant for Customer A, makes the match, and as Customer A departs, moves on to Customer B and customizes the store's merchandise to his unique needs.

In his book "The Paradox of Choice: Why More is Less," psychology professor Barry Schwartz notes that there is "Ample evidence that we are faced with far too many choices on a daily basis, providing an illusion of a multitude of options when few honestly different ones actually exist." The conclusions Schwartz draws will be familiar to anyone who has flipped through 900 eerily similar channels of cable television only to find that nothing good is on. Whether choosing a healthcare plan, choosing a college class or even buying a pair of jeans, Schwartz, drawing extensively on his own work in the social sciences, shows that a bewildering array of choices floods our exhausted brains, ultimately restricting instead of freeing us.

Many of the personal shopper's job functions parallel SLA's competencies for information professionals in the 21st Century. An information professional often provides services for a specific organization, though may be hired as a consultant for project work. The information professional proactively markets library services to end users who place a high value on this service, such as managers who are too busy to do it themselves, or to further top organizational priority projects.

The relationship between the customer and the information professional starts with a thorough reference interview to clarify what information is needed, what it will be used for, the timeframe in which results are needed, as well as budgetary constraints. And the information professional adds value through thorough subject matter expertise – what data sources to search, how to assess information to distinguish credible sources, and how to package the final results so they can be easily understood, and acted upon. Both the end user and the information professional in this scenario know the end user could have attempted the search, but the end user experiences value from relying on an expert, and the information professional adds value to the organization by facilitating better management decision making.

A more typical mental model of an information professional is one of a searcher who passively resides in the library and waits for end users to initiate a search, either by walk in, call, or e-mailing an issue. A cursory reference interview is done, a search of library sources occurs, and the end user receives a document with numerous records. The end user will spend quite a while reviewing the results, looking for the gems of wisdom somewhere within. If the end user has a low level of information literacy, records will be selected if they support the end user's pre-determined opinions, rather than providing more objective decision support. The information professional will put down a count for the number of customers served, and this will go to library management as a measure of value offered by the library – "1,000 served this month." The library manager submits usage statistics to senior management, who sees a budget line item to answer questions that could have been answered by the end users themselves if they'd used Google.

Extend Value with Organizational Savvy

The concept of “marketing” comes with its own perceptions, both positive and negative. Marketing adds value where it helps your target audience understand how you can help them. At its best, marketing efforts make a clear pitch about what your services are, and how they are relevant to the problems your audience faces. These efforts are not broadcast to parties to whom your service is irrelevant.

Because marketing is often not targeted or timed, general messaging unclear, and benefits not identified, marketing attempts are often perceived as “noise,” a waste of otherwise valuable time, an interruption of important work, and even as self-promotion of irrelevant tasks. As one manager outside of the library said, “Marketing fluff will not change anyone’s perceptions! Information professionals should focus on providing value and action.”

In short, sending broadcast e-mails and hosting open houses to display what resources are available in the library are often perceived as all talk without any relevance or action. But if you proactively send interested parties in senior management a concise analysis of an acquisition opportunity, or merger activities recently undertaken by competitors, you may meet needs these managers didn’t even know they had.

Another request was for information professionals to learn their organization’s structure and culture, and to find acceptable ways to approach users and determine their needs. Consider approaching those people in management with whom you already have a working relationship. A good place to start is by working with your manager, identify unmet needs in your organization, and put together a plan.

Activities That Extend Value

Here are some concrete activities to consider that increase your value to your organization:

1. Collaborate with other divisions
2. Be known as a subject matter expert in information and information tools
3. Provide information analysis, not just data
4. Map business process best practices
5. Research what practices improve ROI for your enterprise
6. Use reference interview skills to ensure that real information needs are elicited
7. Consider learning “Voice of the Customer” techniques, to bring better customer interviewing practices to your product development and marketing teams.
8. Find out what information tools knowledge workers are using, or need
9. Identify the information your organization has and who needs to know what
10. Practice identifying experts. When stakes are high, third-party research is rarely sufficient. Your ability to locate key topical experts, obtain their contact information, even possibly interview them, will raise your visibility and let you provide faster, more robust information.
11. Teach information literacy – help knowledge workers find the appropriate information for their needs, to use it responsibly (copyright/archiving), and to store it in a way that will make it retrievable in the future.

12. Make information more findable. Be part of the team that reviews your corporate website for usability. Can users navigate and find information? Does your marketing department have a system for archiving product documentation and marketing collateral? Can you help increase ease of access for internal documentation searching?

Elizabeth Orna, an independent information consultant, has written an entire book on information policies and outlines the explicitly pathways to mapping your organization, integrating information services, and implied activities. Similarly, review SLA's Core Competencies for Info Pros in the 21st Century.

Conclusion

A number of us have struggled for a while with a more powerful name for this construct, attempting to come up with a name that highlights the value information professionals today bring. We started with terms like library, information, knowledge, expert, service, etc., though quickly we determined that these terms are overused, and therefore their meanings have become devalued. In the end, perhaps "Strategic Information Consultant" seems to best convey the personal shopper concept as it was originally intended.

Endnotes

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