



# Assessing Clients' Needs: Map Information Flows

A Quantum<sup>2</sup> Seminar

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## Strategic Competencies

- Environmental analysis
- Knowledge culture vision
- Perception analysis
- Relationship management
- Management buy-in

## Business Competencies

- Needs assessment
- Service definition
- Marketing: Package, Promote, Persuade
- Performance
- Measurement

Gather Data  
Analyze Results  
Map Information Flows



- Objectives & Introduction
- Why Map Information Flows
- 5 Steps of Info-Mapping
- Key Learnings & Action Plan

- To enable participants to:
  - Understand the business context and benefits of mapping information flows
  - Learn the 5 steps of the mapping process
  - Identify basic elements of an action plan

- Why are you here?
- What personally made you want to come?
- What do you expect to take away from the class?

*Mapping information flows is a process for analyzing how information is transferred from one point to another within the organization.*

***Mapping information flows will help you...***

- Understand how information is used and by whom
- Uncover who is your ultimate client for various types of information requests
- Focus your services on the highest potential opportunities

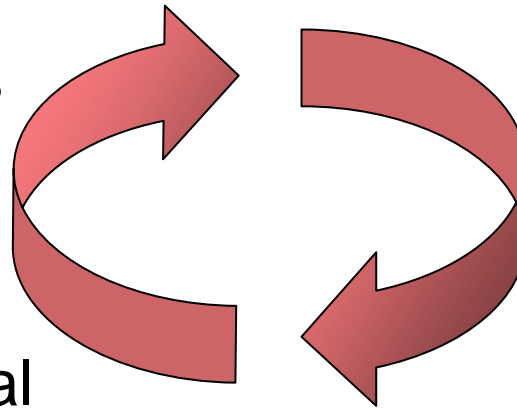
**1** Describe Existing Situation

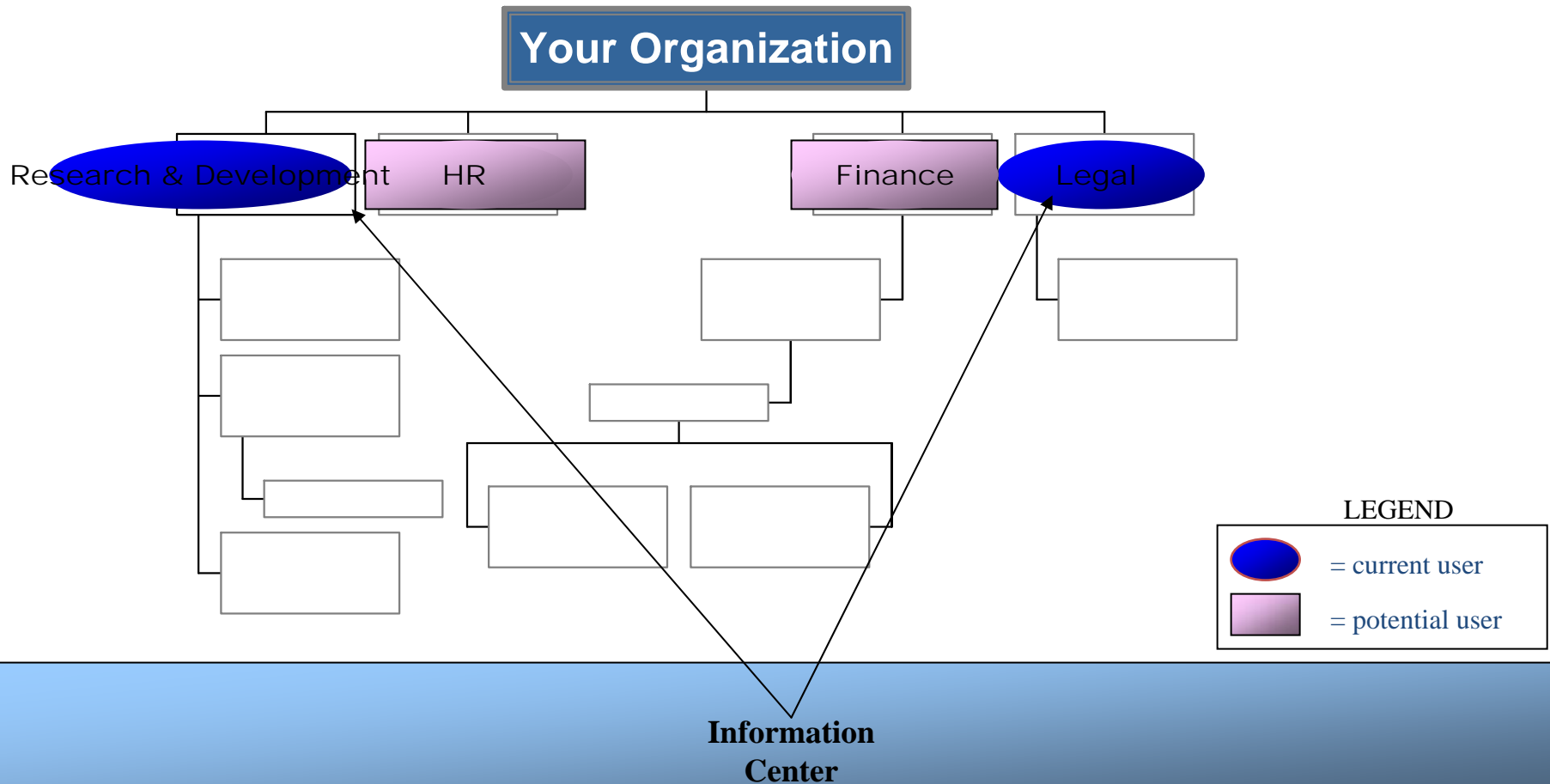
**2** Identify Potential Clients & Needs

**3** Describe Potential Solutions

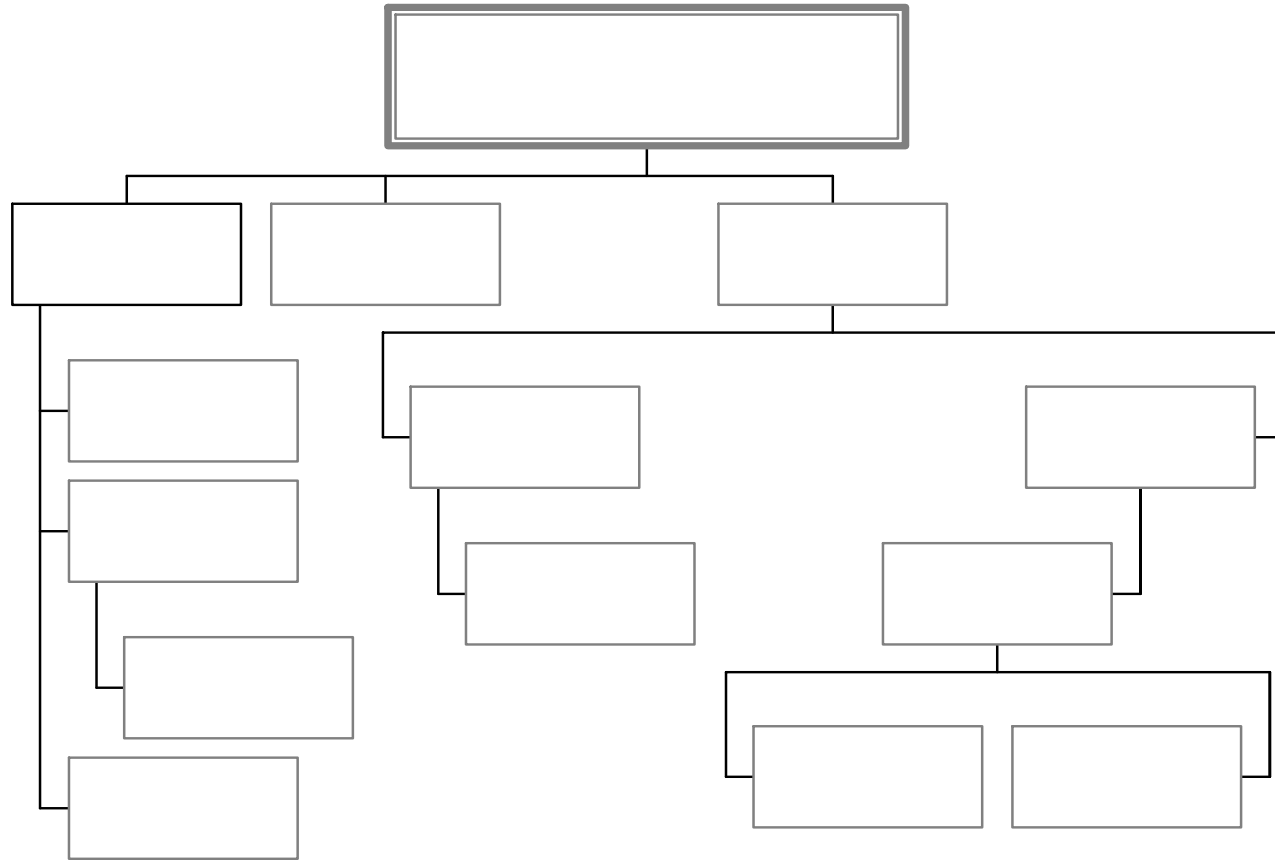
**4** Rank Potential Solutions

**5** Map Final Solutions






Your Organization



**Information Center**

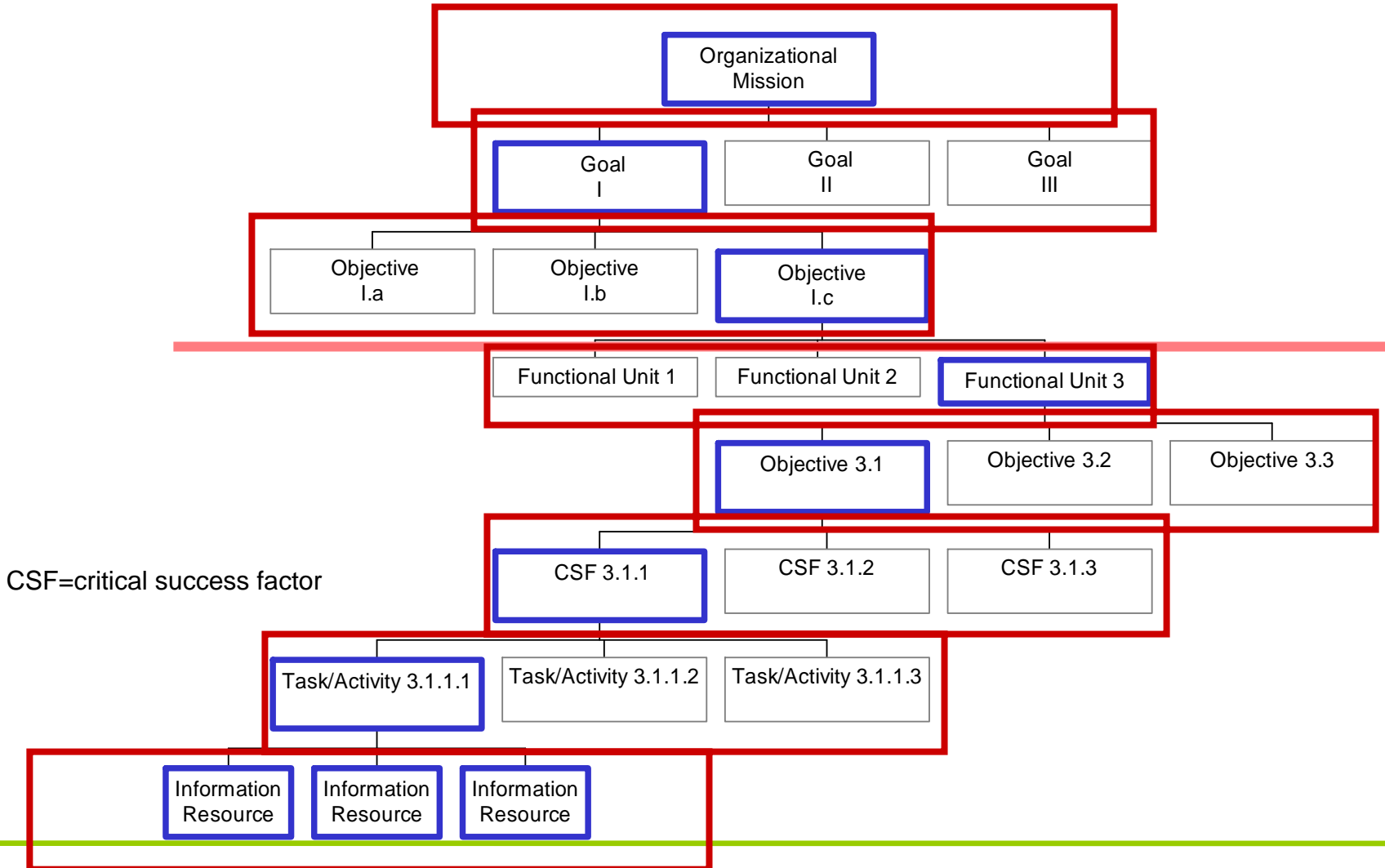
LEGEND

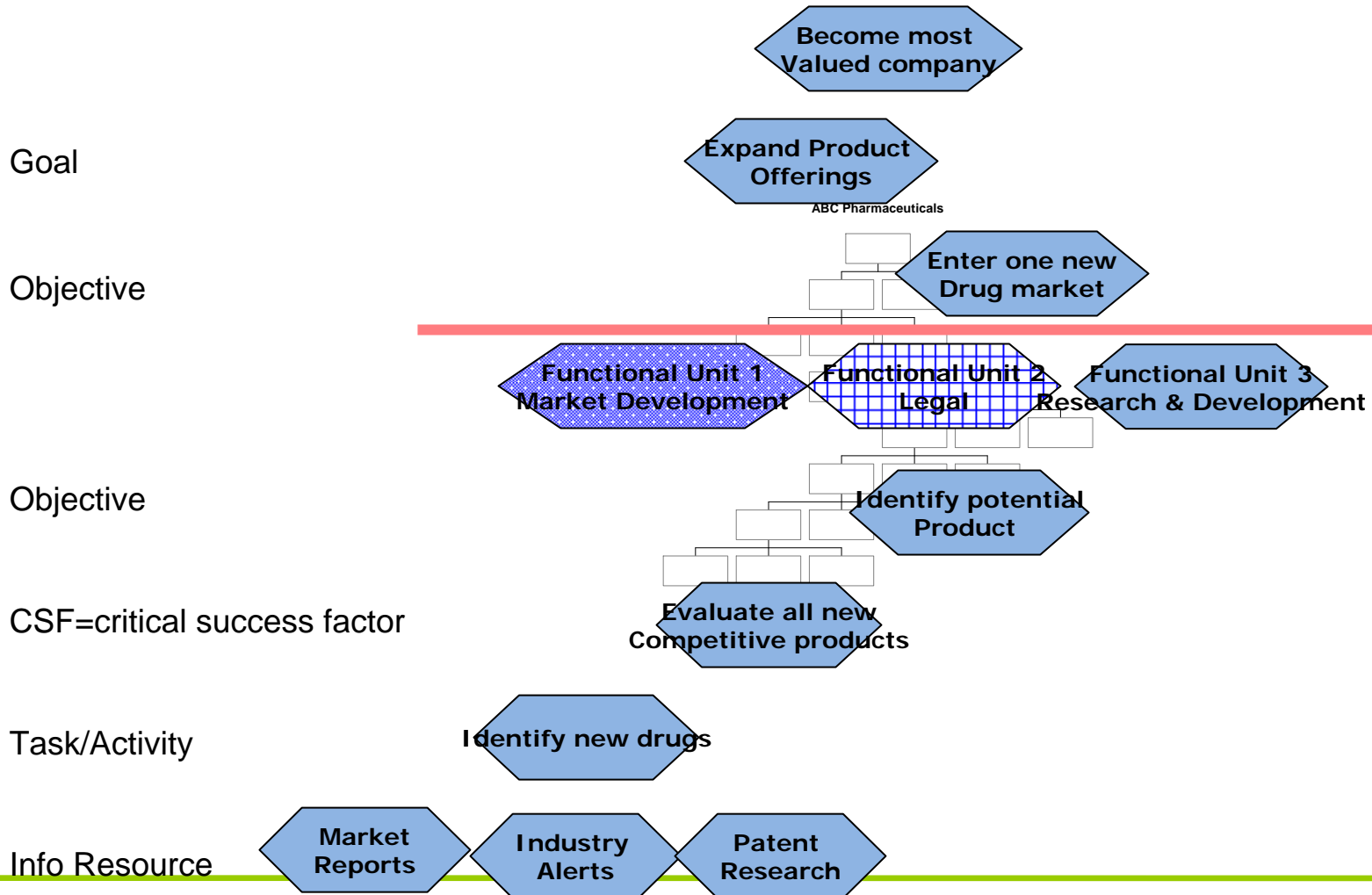
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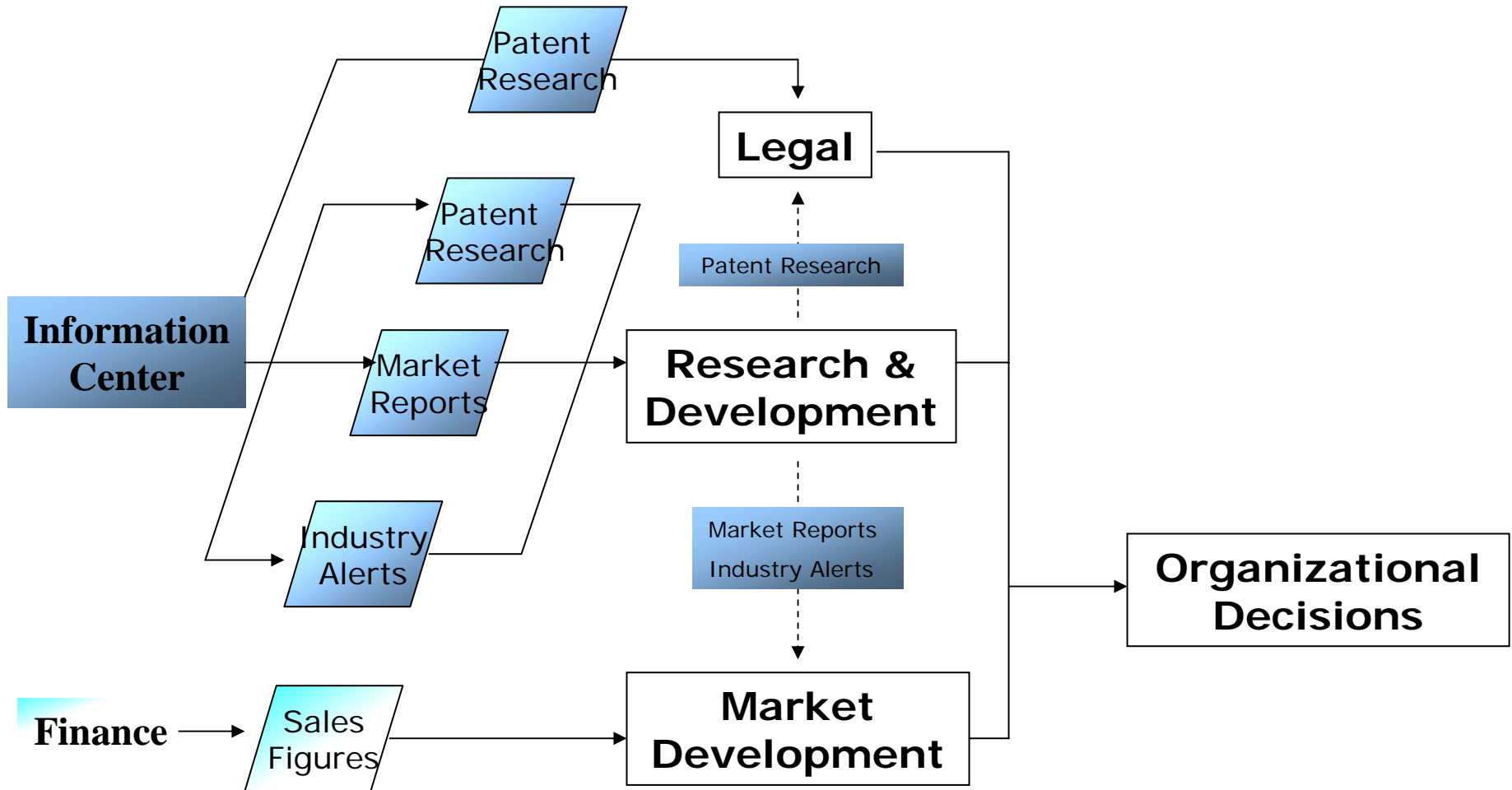
### Feedback

- Did you discover anything?
- Did you identify possible new opportunities?
- Ask yourself:
  - Who are senior executives not in your direct chain of report?
  - Who are individuals with broad influence?
  - Who is someone you can work with to identify the needs of the unit?

## The Organization



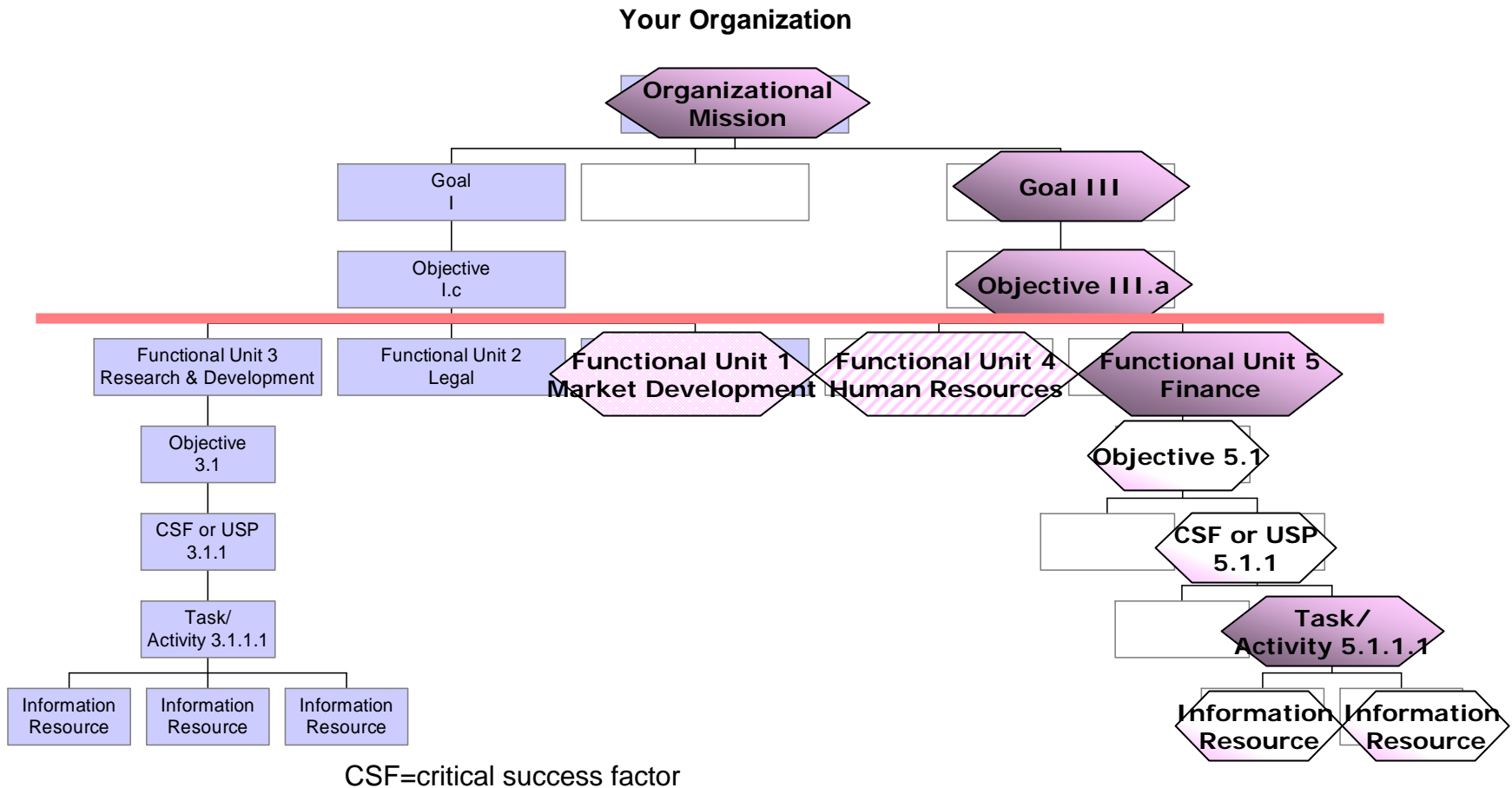


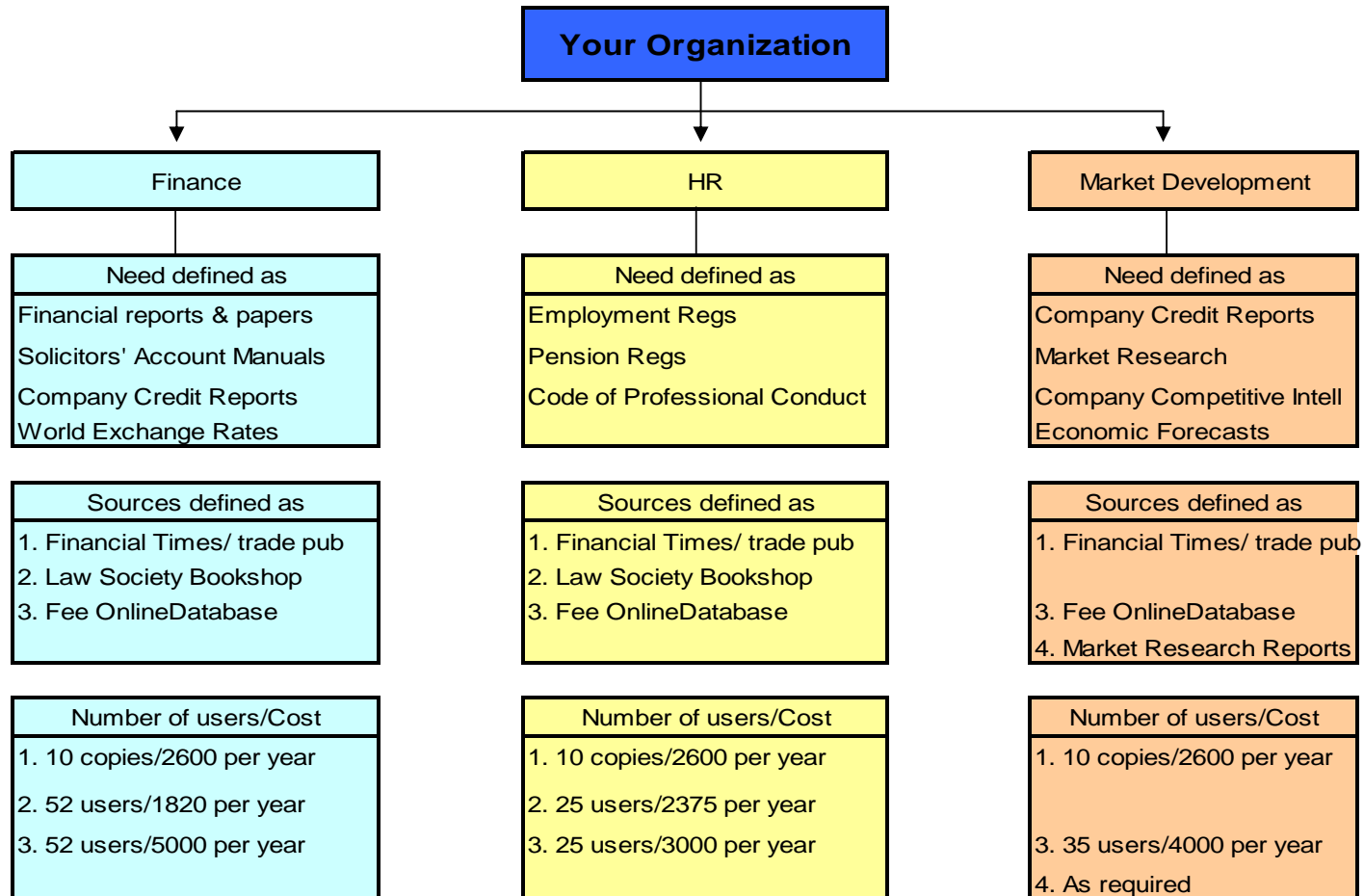


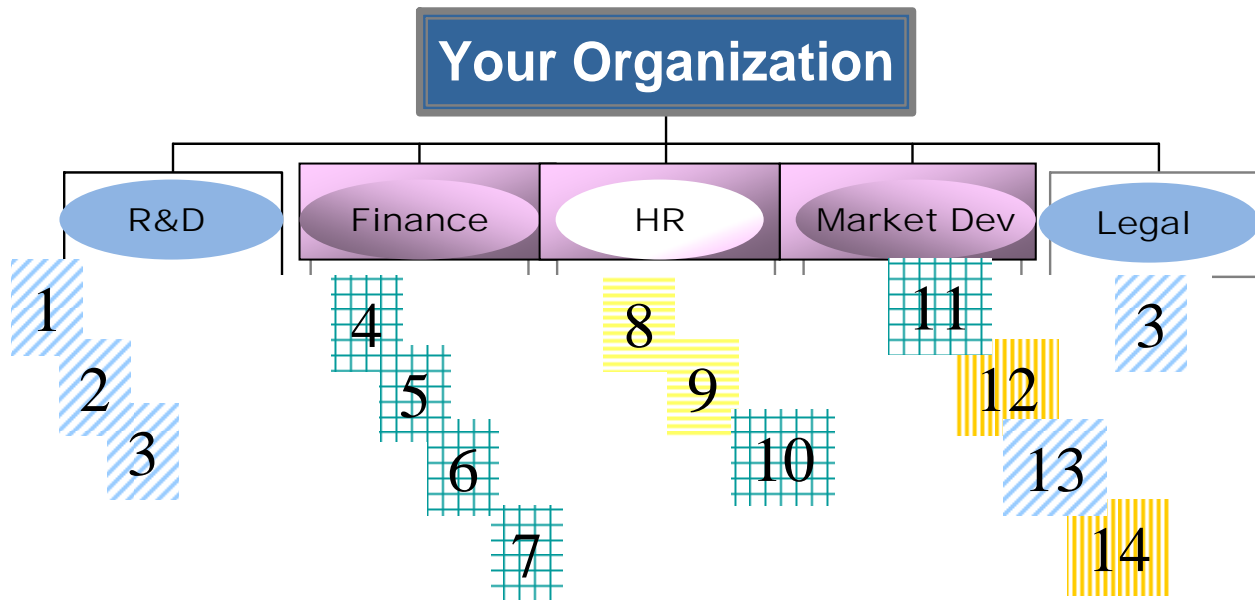
<b>Organizational Mission</b>	We will become the most valued company globally to customers, colleagues, business partners, and the communities where we work and live.		
<b>Goals</b>	I Expand product offerings	II	III
<b>Objectives</b>	<p>I.a</p> <p>I.b</p> <p>I.c Move into one new drug market.</p>		
<b>Functional Units</b>	1.	2.	<b>3. Research &amp; Development</b>
<b>Objectives</b>			<p>3.1 Identify potential product for development</p> <p>3.2</p> <p>3.3</p>
<b>Critical Success Factors</b>			<p>3.1.1 Evaluate all new competitive products</p> <p>3.1.2</p> <p>3.1.2</p>
<b>Tasks/Activities</b>			3.1.1.1 Identify new drugs brought to market
<b>Information Resources</b>			<p>3.1.1.1.1 Industry Alerts</p> <p>3.1.1.1.2 Market Reports</p> <p>3.1.1.1.3 Patent Research</p>

*For each functional unit, ask*

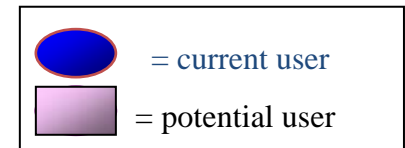
- What are the organizational goals?
- What are the various objectives assigned to each department?
- What are the tasks & activities associated with the objective?
- What information is necessary to complete each task?
- What current resource/solution is meeting the requirement?
- What product does the IRC offer currently or can create to meet the requirement?







**LEGEND**



**Information Center**

- 1. Industry Alerts
- 2. Market Reports
- 3. Patent Research

**Finance**

- 4. Financial Reports & Papers
- 5. Solicitors' Account Manuals
- 6. World Exchange Rates
- 7. Company Credit Reports

**Human Resources**

- 8. Employment Regulations
- 9. Pension Regulations
- 10. Code of Professional Conduct

**Market Development**

- 11. Company Credit Reports
- 12. Company Competitive Intell
- 13. market reports
- 14. Economic Forecasts

Finance	HR	Market Development
<b>Need defined as</b> Financial reports & papers Solicitors' Account Manuals Company Credit Reports World Exchange Rates	<b>Need defined as</b> Employment Regs Pension Regs Code of Professional Conduct	<b>Need defined as</b> Company Credit Reports Market Research Company Competitive Intell Economic Forecasts
<b>Sources defined as</b> 1. Financial Times/ trade pub 2. Law Society Bookshop 3. Fee OnlineDatabase	<b>Sources defined as</b> 1. Financial Times/ trade pub 2. Law Society Bookshop 3. Fee OnlineDatabase	<b>Sources defined as</b> 1. Financial Times/ trade pub 3. Fee OnlineDatabase 4. Market Research Reports
<b>Number of users/Cost</b> 1. 10 copies/2600 per year 2. 52 users/1820 per year 3. 52 users/5000 per year	<b>Number of users/Cost</b> 1. 10 copies/2600 per year 2. 25 users/2375 per year 3. 25 users/3000 per year	<b>Number of users/Cost</b> 1. 10 copies/2600 per year 3. 35 users/4000 per year 4. AS required

**Reallocation/New Solutions/Cost**

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**Reallocation/New Solutions/Cost**

2. Electronic version with site license @ 3000/year

1.& 3. Online database service offering FT, Market Research, and resources for Company Reports & CI @ 50,000/year

### Three levels of risk to the organization

#### **1. Individual user decision**

- Little risk to organization
- Preliminary project proposal
- End-user searches web for info to make non-risk decisions

#### **2. Department level budget or priority**

- Moderate risk
- Product or market plan
- End-user searches web and seeks further help as decision involves risk

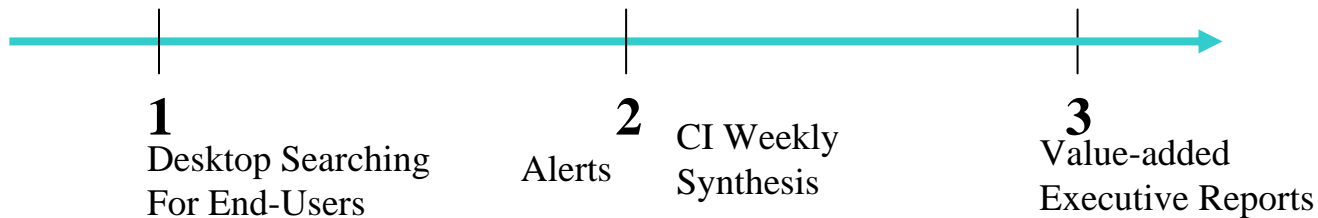
#### **3. Mission critical or new market entry**

- Significant company revenue or investment at risk
- Merger or acquisition
- End-user asks IRC to provide information as decision has high monetary risk

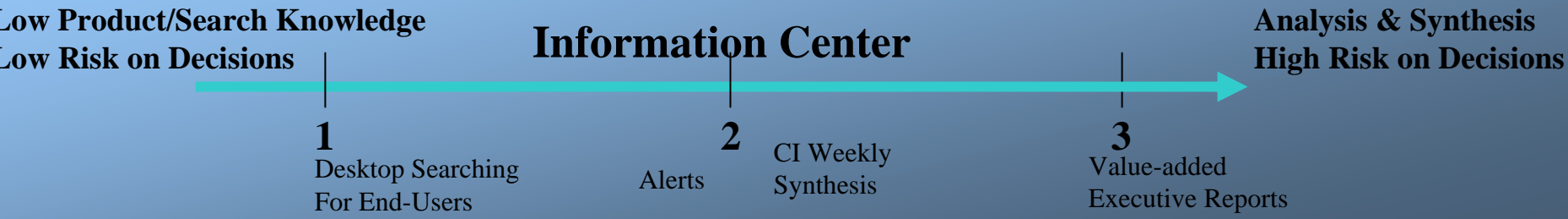
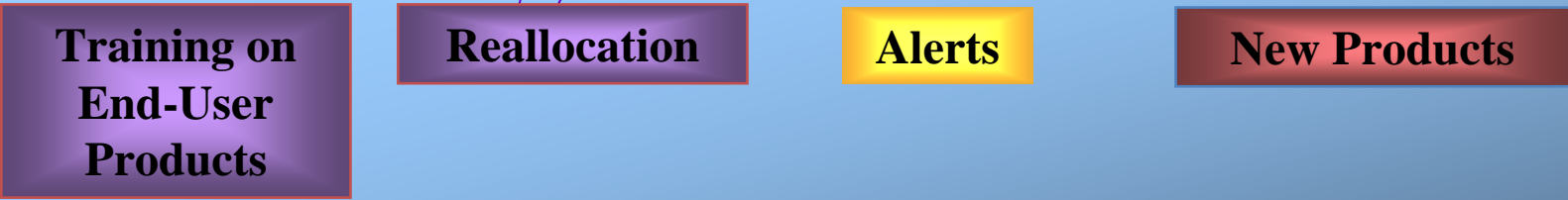
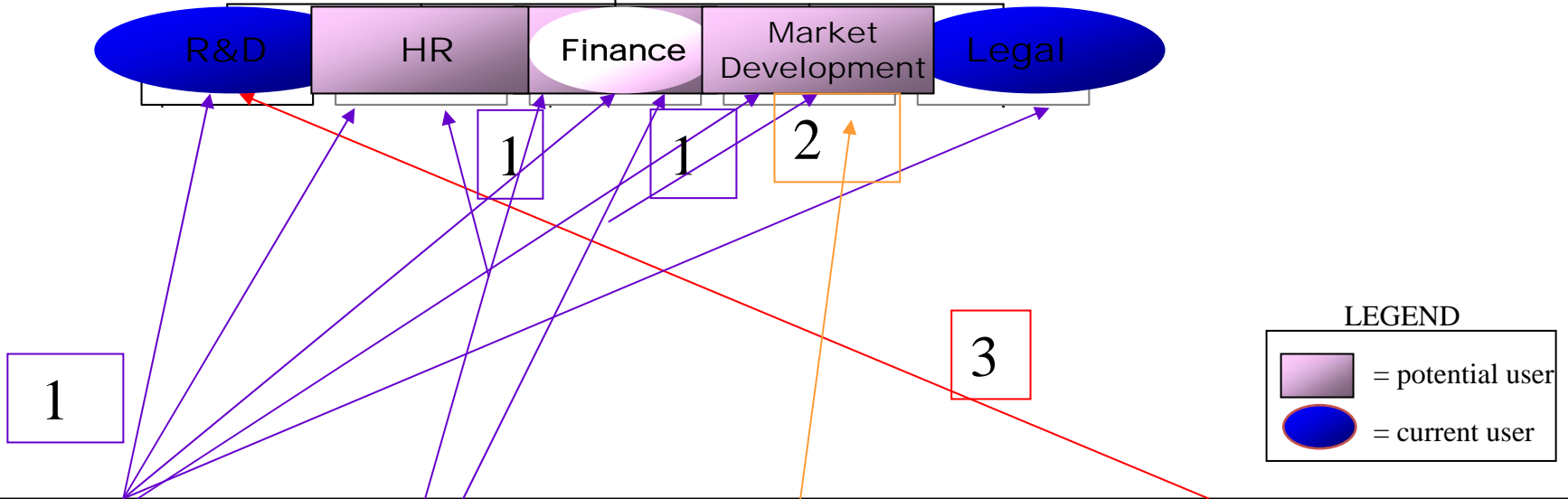
## Continuum of Risk to the Organization

**Low Product/Search Knowledge**  
**Low Risk on Decisions**

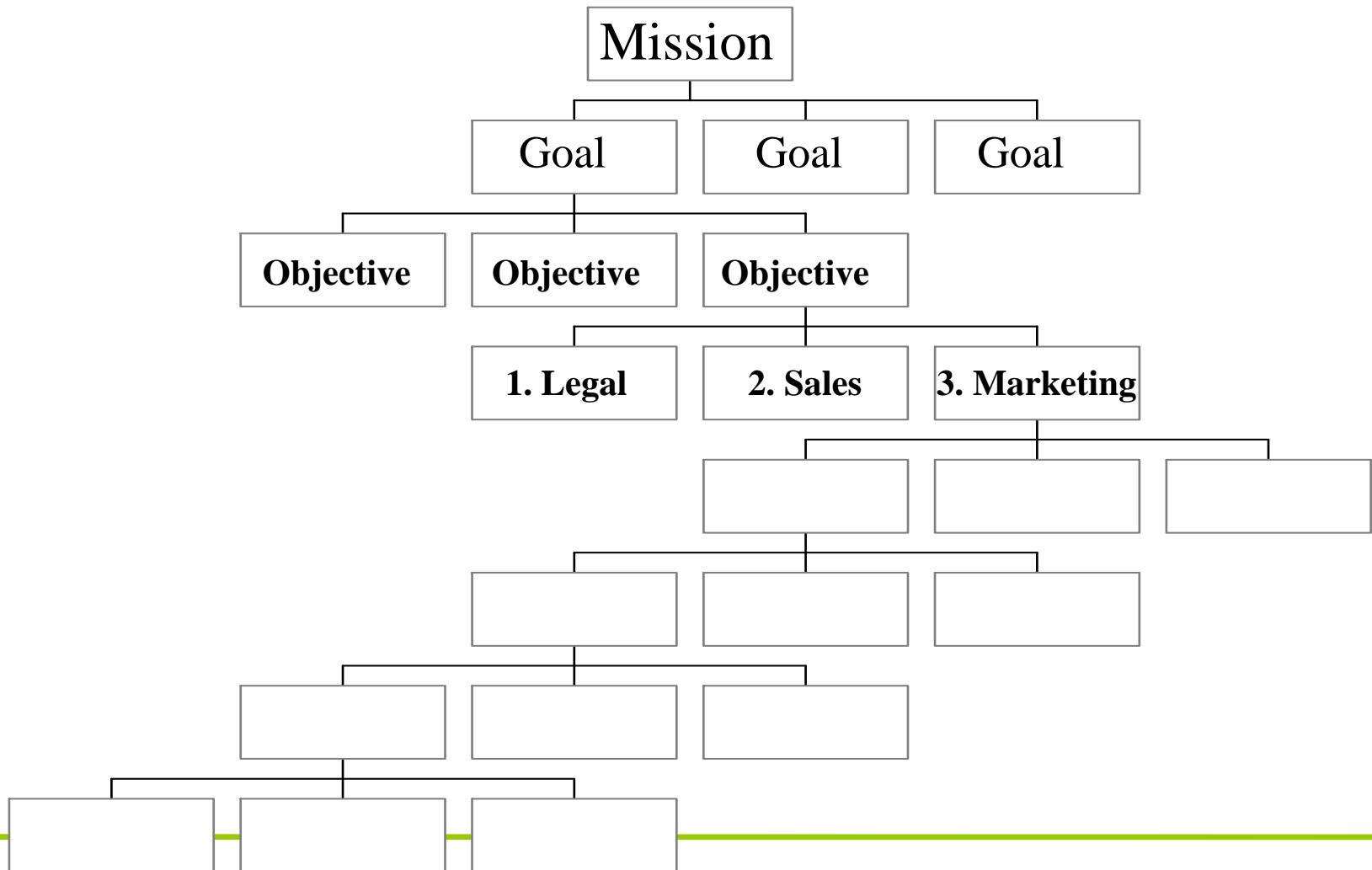
**Analysis & Synthesis**  
**High Risk on Decisions**



### Your Organization



**ABC Pharmaceuticals**



1. Make a rough org chart
2. Indicate current clients
  - What are the information solutions you provide?
  - What are possible solutions they might need?
3. Indicate potential clients based on goals/objectives/tasks
  - What are possible solutions they might need?
  - What is the decision risk level?
4. Which department manager will you interview first to complete the information map for this client?
  - Write a date for interviewing this new client
  - Write three possible questions to aid in determining appropriate information solution.

### Sample Questions:

- What are your department's objectives?
- What's your view of how information is used in your department?
- How are information requirements changing within your department? The company?
- What do you think about the service my department provides?

### Remember, you need to:

- Prepare preliminary map before meeting with your targeted client and complete map using your questions
- Rank your potential targets to choose the highest value client
- Match identified needs with relevant solutions the IRC can provide
- Discuss the map as a mutual tool to better understand the organization's information needs
- Calculate a feasible budget together

- How to target clients based on alignment with organizational goals.
- Rank potential clients by importance to organizational strategic directions.
- Identify overlap in resources for reallocation and optimum information solutions

Information mapping is an ongoing exercise to be sure of constant product improvement.

Thank you

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