



Best Practices for Information Services: Achieving Operational Excellence

A Quantum² Leadership Seminar

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The Quantum² Leadership Circle

Strategic Competencies

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

Business Competencies

- Needs assessment
- Service definition
- Marketing
- Performance
- Measurement



- Fit into several categories
- Alignment of information service with key organizational markets and critical initiatives
- Knocking down of physical and organizational walls in global companies
- Finding time to market with the lack of available resources
- It's all about Content! - *multiplicity, evaluation, deployment*
- Flat budgets and staffing levels, and outsourcing of key operations
- Availability of information in users' digital workspace – The Virtual Library 24/7
- Disintermediation and the “Google Effect”
- New information technologies

- Deal proactively with resources – *Understand Return on Investment (ROI), cost justification, budget tradeoffs*
- Improve internal image and effectiveness— *develop best practices gain commitment*
- Build relationships with clients— *proactive marketing, customer focus*
- Understand competition – *internal and external*
- Demonstrating analytical skills for added value —*add value to information*
- Increasing skills portfolio for content deployment - *web/intranet/portal development—negotiation skills*
- Understand the true information needs of the organization – *needs assessment, info mapping*
- Diversity of user requirements – *departmentally and globally*

What is a Best Practice?



Some definitions of **Best practice**:

- A working method, or set of working methods, which is officially accepted as being the best to use in a particular business or industry, usually described formally and in detail. Cambridge Advanced Learner's Dictionary, Cambridge University Press, 2003.
- The processes, practices, or systems identified in public and private organizations that performed exceptionally well and are widely recognized as improving an organization's performance and efficiency in specific areas.
geminfo.org/help/about/documentation/gem-controlled-vocabularies/vocabulary-resource-type
- A best practice is a technique or methodology that, based upon experience and research, has proven to reliably lead to a desired result.
www.pemcocorp.com/library/glossary.htm
- An activity or procedure that has produced outstanding results in another situation and could be adapted to improve effectiveness, efficiency, ecology, and/or innovativeness in another situation.
www.ichnet.org/glossary.htm
- A concept referring to the best way of doing something, normally a function or process within an organization. Hence for example 'best practice organizations' - those who are at the forefront/ have the best procedures.
www.otte.vic.gov.au/publications/benchmark/resources/docs_what/what02_glossary.htm

A best practice is the best way of carrying out a function or process.

- Improve work processes for organizational efficiency
- Maximize your current resources
- Explore new services or products
- Build stronger relationships across the organization
- Prove value

Potential Pitfalls

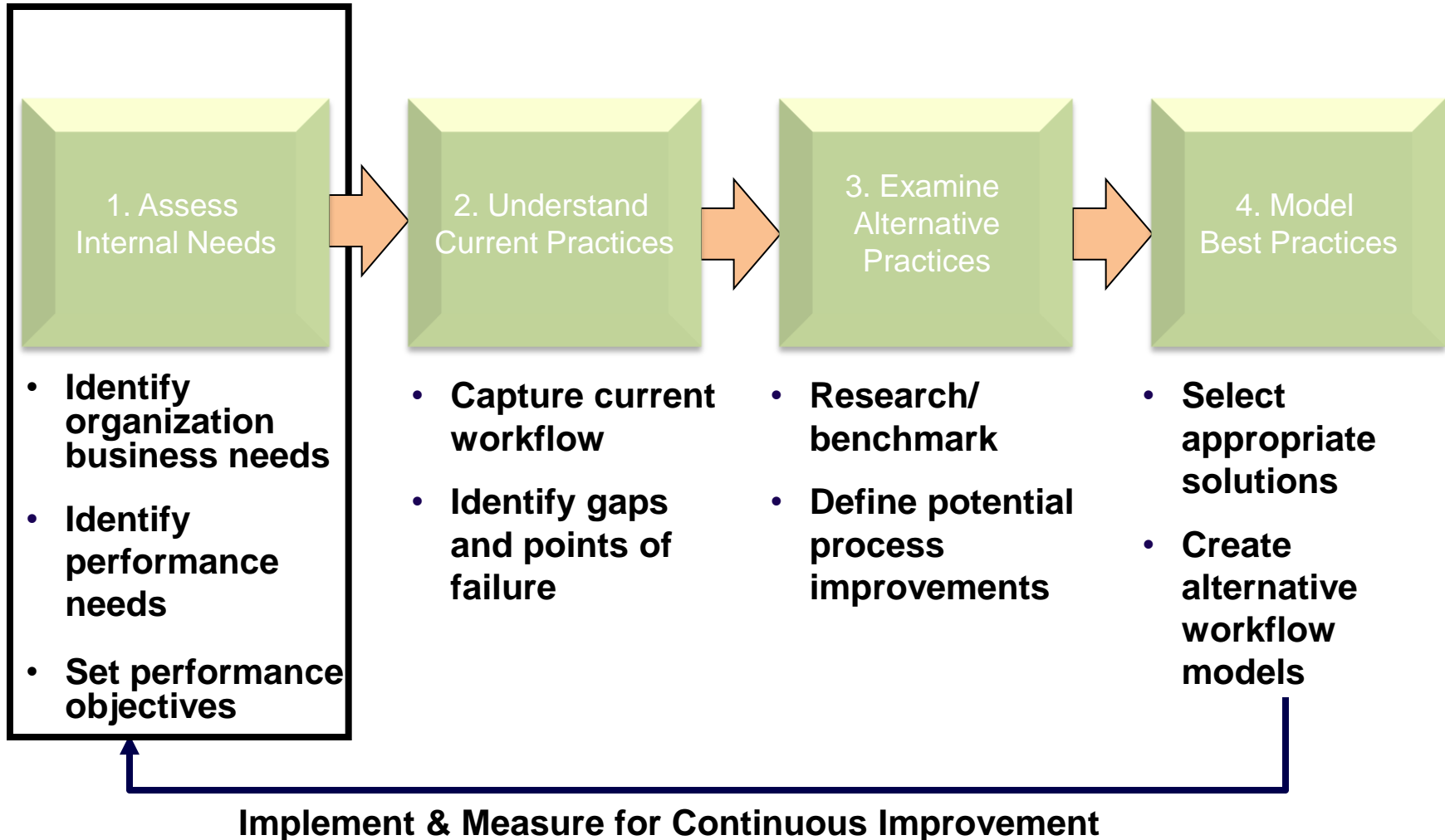
Internal Obstacles

- Hard to make tacit knowledge explicit
- Takes time to research and create
- Identification of critical business knowledge
- Takes effort to implement & gain acceptance

External Obstacles

- Cost of purchasing benchmarking reports
- Difficulty finding organizations to cooperate

Four Steps to Operational Excellence



- Who are your customers?
 - Senior management
 - Client users
 - Information Centre staff

- **Activities of Business**
 - Coming up with new ideas
 - Improving implementation and processes

- **Identifying a Business Need**
 - Finding the gap between the status quo and identified business activities

- Sample Information Requests
 - Queries into existence and utility of existing technologies
 - Market intelligence
 - Customer and competitor research

Compelling Business or Financial Events

- Mergers, acquisitions, divestitures
- Products changed or introduced
- Regulatory/legal changes
- Societal changes
- Staffing pattern changes (work-at-home, redundancies/lay-offs, contractors)
- Markets opening or closing
- Distribution channel changes

Group Discussion

- What are some examples of business needs in your organization?

- How to Find Business Needs
 - Determine the goals, objectives, concerns, values, plans and problems of senior management
 - Make the Information Centre visible
 - Keep communication channels open
 - Read internal documents
 - Be proactive, but be flexible

- Identify Performance Gaps or Needs
 - Outline the desired performance
 - What are you expected to perform, how and when?
 - Describe actual performance
 - Difference between the desired performance and actual performance is the “performance gap” or need
 - Conduct analysis to find out why there are performance gaps or needs
 - Select appropriate action(s) to improve performance
 - Eg appropriate solutions, information content, skills or training

- Identify performance gaps or needs
 - Senior Management
 - How much money you receive and how you spend it
 - How you save money for the company and how much
 - How much time you save your Clients that increases productivity
 - Clients
 - Availability and expertise of staff
 - Availability of information when they need it
 - How easy it is to obtain information
 - How long to fill a request

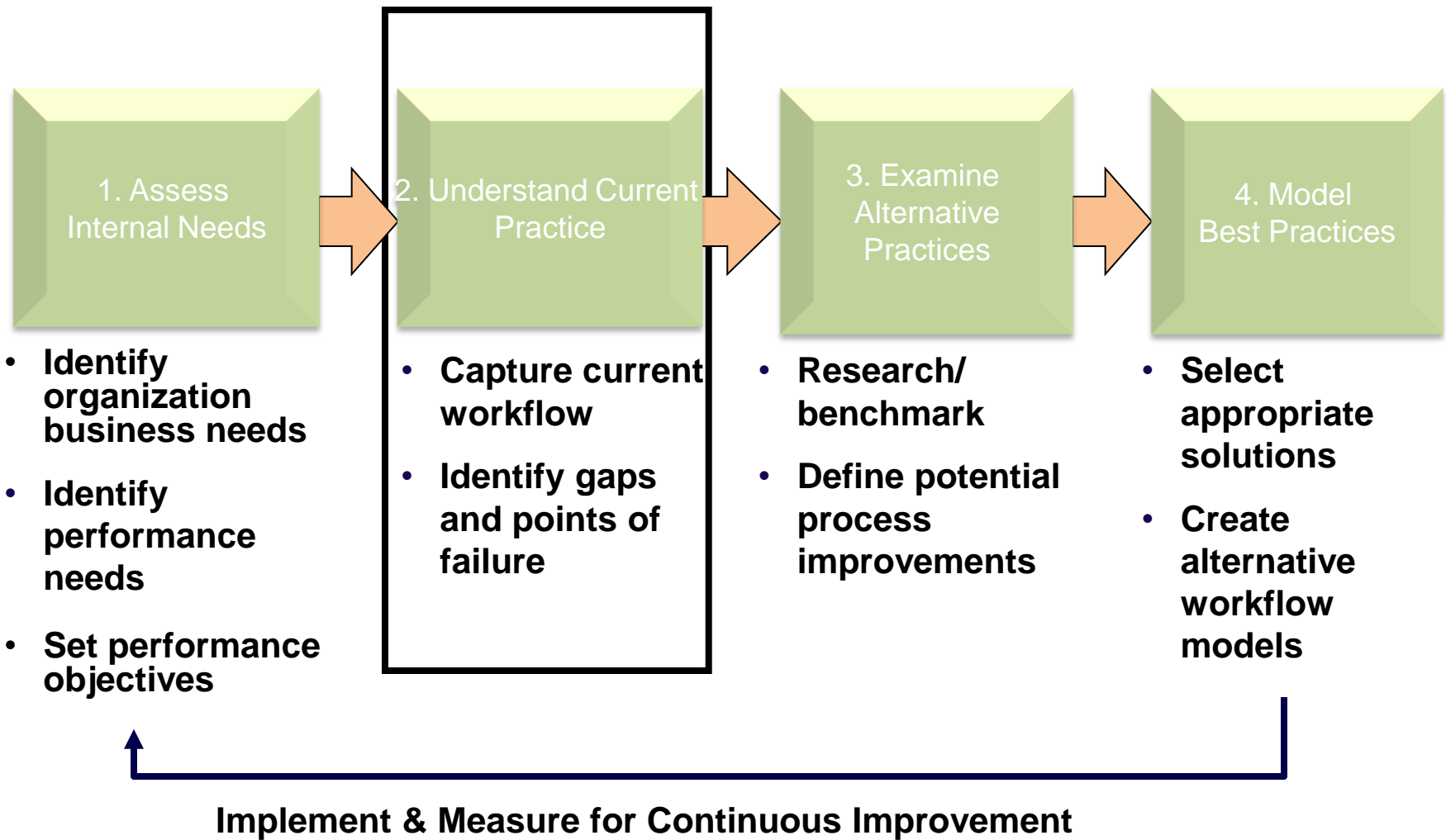
- What is an Information Needs Assessment
 - Information needs assessment is the process of gaining an understanding of your clients' information use habits, preferences, and perceptions, based on their direct feedback
- Techniques for Needs Assessment
 - Surveys
 - Questionnaires
 - Interviews
 - Personal
 - Focus Group
 - Observation

- Set Performance Objectives
 - How do customers see the information centre? (customer perspective)
 - At what must the information centre excel? (internal perspective)
 - Can the information centre continue to improve and create value? (innovation and learning perspective)
 - How does the information centre look to stakeholders? (financial perspective)

- Set Performance Objectives
 - What do users value?
 - Has this reshaped your thinking on content selection?
 - Have you discovered additional justifications to support your budget?
 - Building a feedback loop: does your valuation of services match your clients?
 - Are we doing things right? / Are we doing the right things?
 - What is the minimum performance your users expect?
 - What is the maximum?

- **Be Back in 15 Minutes**

Four Steps to Operational Excellence



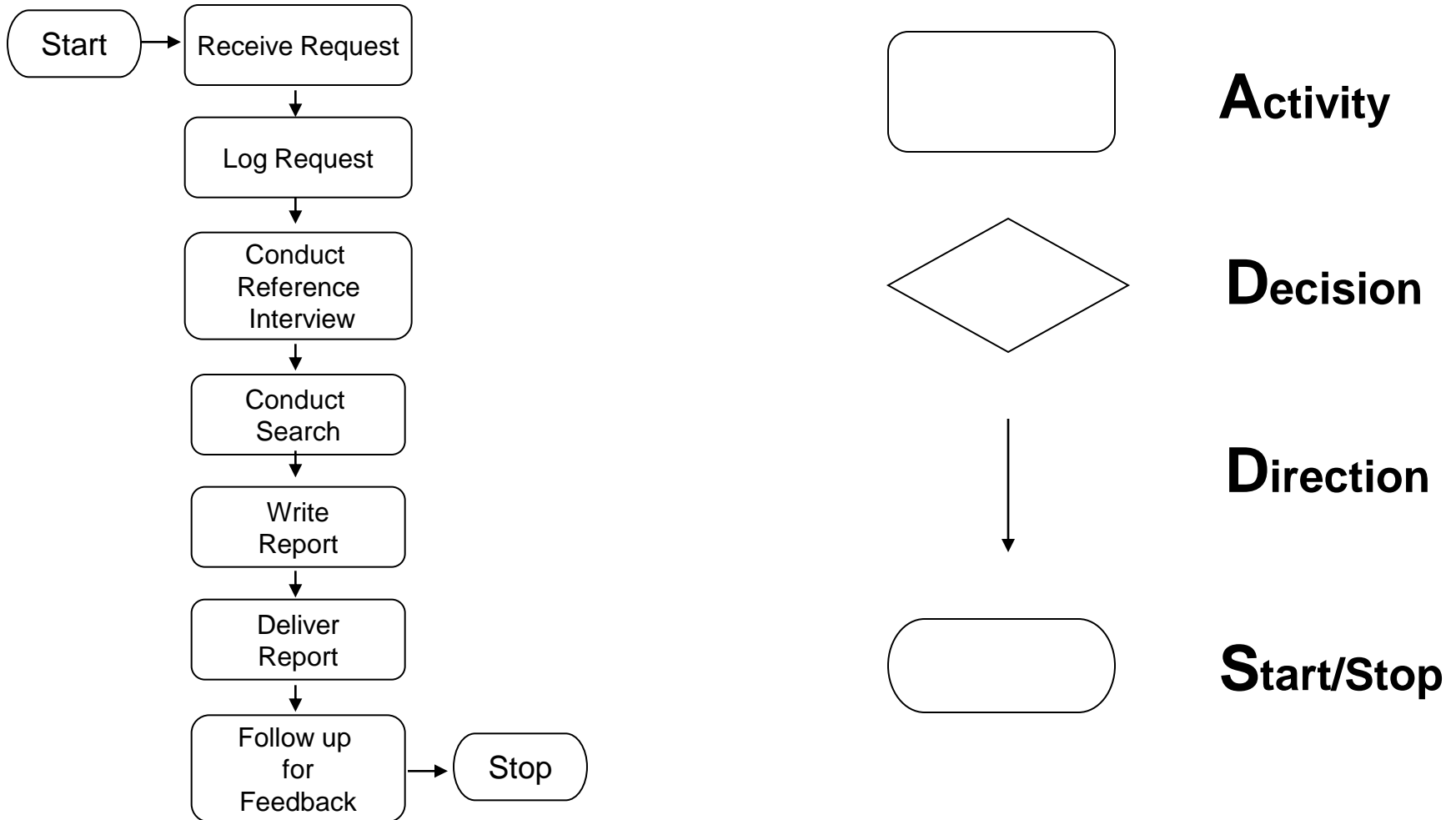
- Current Work Process

- Handling an information request

- Receive request for information
 - Log request
 - Conduct reference interview
 - Conduct research
 - Write up report
 - Deliver to customer
 - Follow up for feedback

Current Workflow Model

Handling an information request



Current Work Process with Gap Analysis

Handling an information request

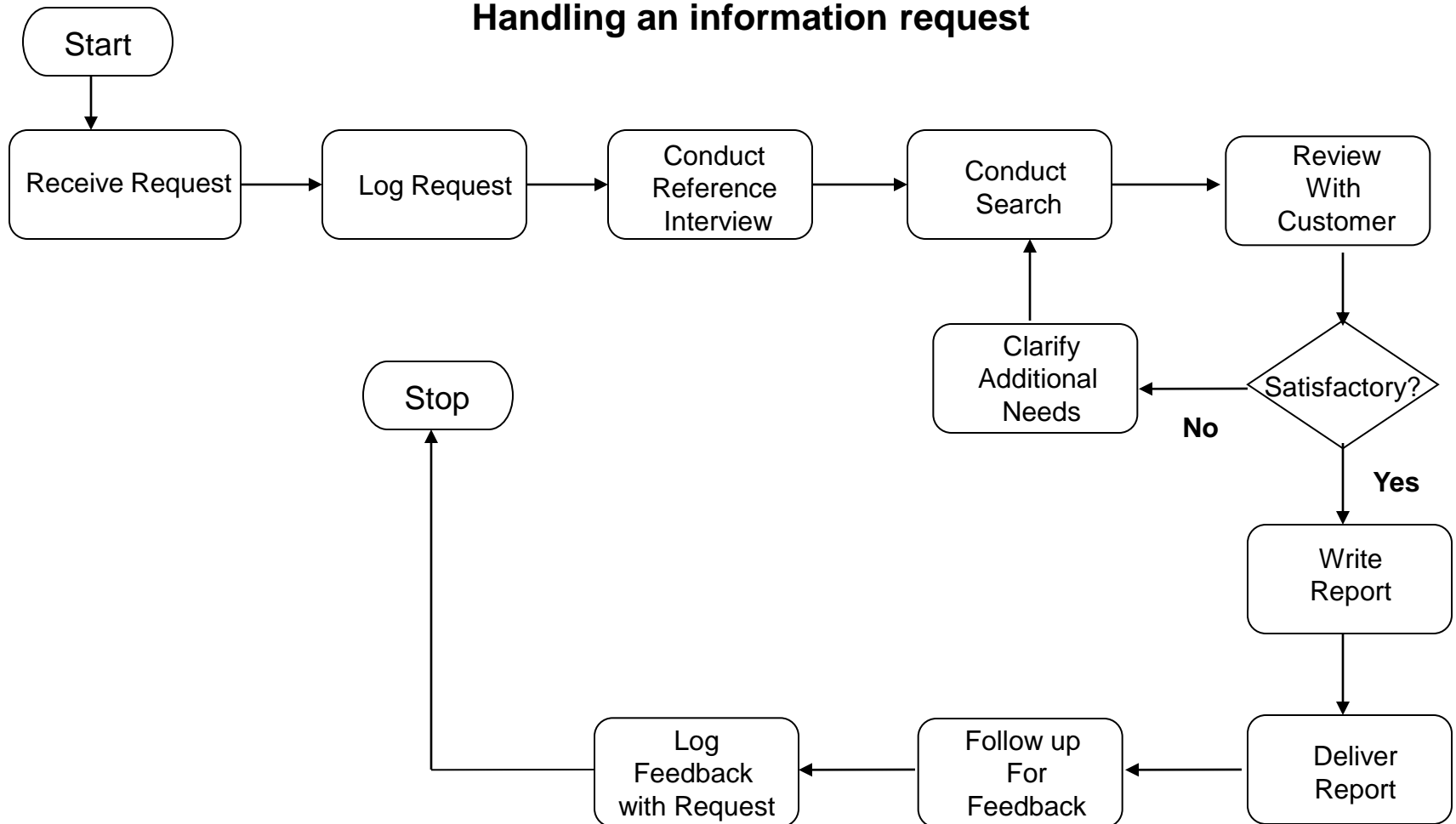
- Receive request for information
- Log request
- Conduct reference interview
- Conduct research
- Review with customer
- Satisfactory or Not Satisfactory
 - » Clarify additional needs
 - » Conduct research
 - » Review with customer
 - » Satisfactory
- Write up report
 - Include branding
- Deliver to customer
- Follow up for feedback
- Log feedback

Step 2: Understand Current Practices

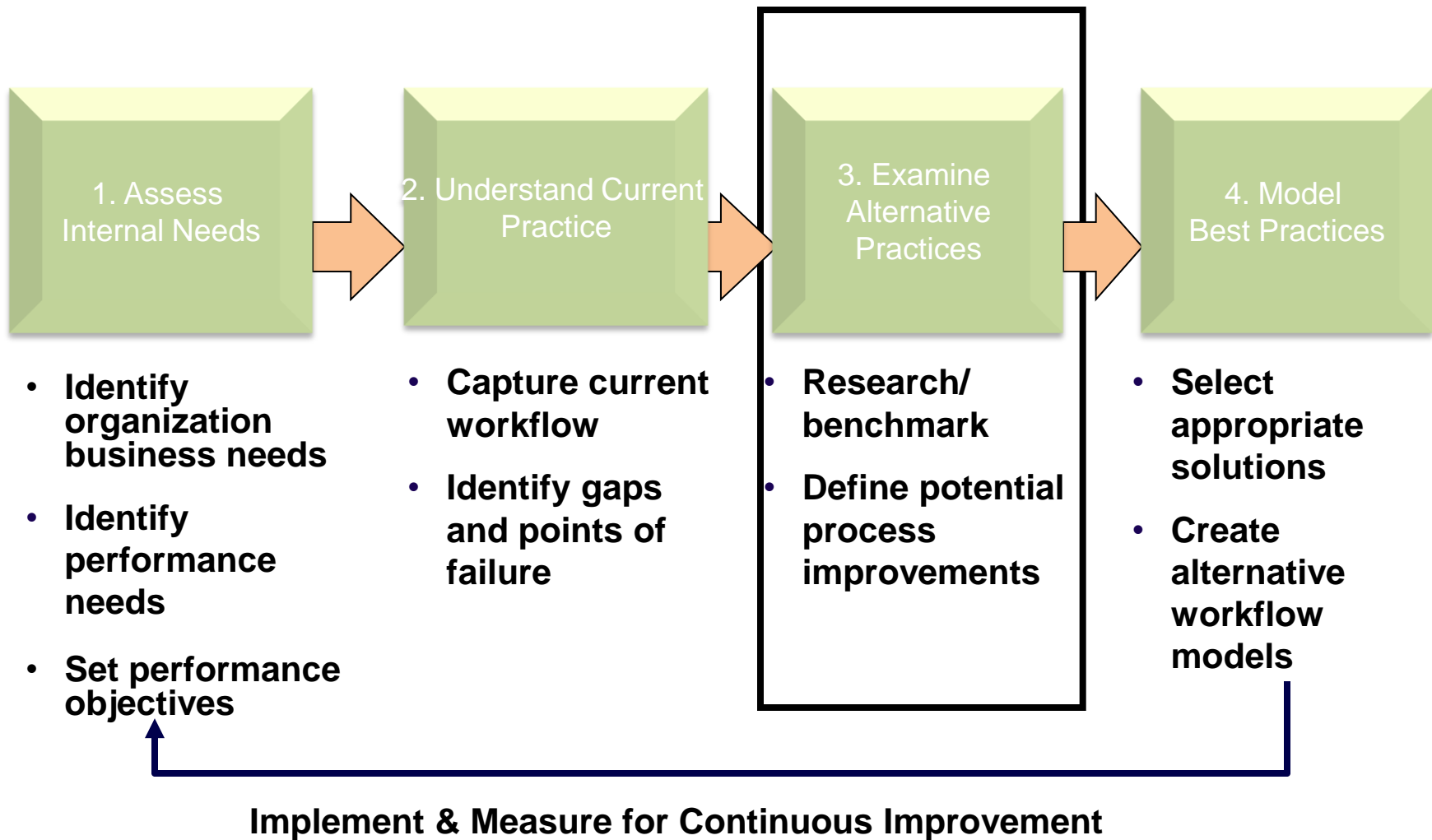


Revised Workflow Model

Handling an information request



Four Steps to Operational Excellence



Benchmarking

- Involves measuring and comparing an existing process, product or service against that of recognised top performers...to identify best practices that lead to sustained performance Corral, Sheila. 2000

- Can take several forms
 - Internal benchmarking
 - Bring together staff responsible for a major initiative with others in the organization to share information, ask advice and discuss lessons learned
 - External benchmarking
 - Research & learn from external, preferably world class, organizations

How to Get Started

- Informal methods
 - Rely on secondary information
 - Informal networking

- Formal methods
 - Engage a research firm
 - Purchase a report

Competitive Analysis

Do the research

- What are other players doing?
 - What systems & processes have they implemented?
 - What information policies are in place?
 - What are they doing with information?

Knowledge Sharing

- Communities of Practice
 - Formed by individuals who may be in different departments or organizations, but support a common project or initiative, or can benefit from drawing on each other's expertise on the job
- Leverage In/Leverage Out
 - Leverage in: each time a new initiative is begun, check for others in the organization or in other companies who have relevant experience
 - Leverage out: each time an initiative is completed, document or disseminate learning and experience so that others can reuse it
- Research and Re-use
 - Use standard formats for business plans, presentations and other documents to minimize development time and encourage consistency
 - Collect and store key internal documents for archival access

External Resources

- Benchmarking reports
- External consultants
- Networking with peers in other companies

Group Discussion

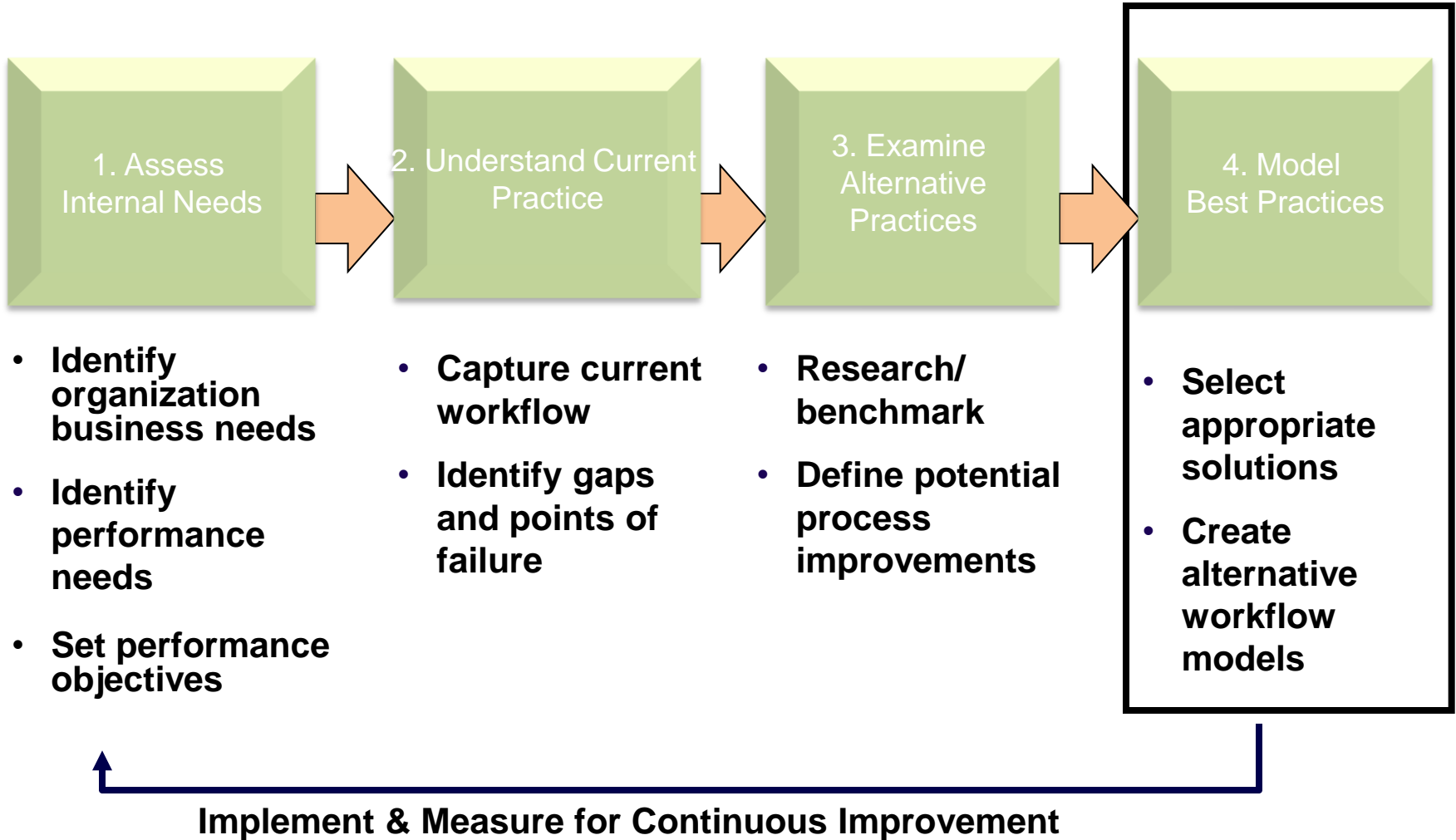
- How do you capture, transfer, reuse and track best practices?
- Have you done any benchmarking?
- What best practice activities have been tried in your organization already?
- What was successful? What failed? Why?

Define Potential Process Improvements

- Analyze best practices for your targeted process
- Note improvement possibilities for use in revised workflow

- **Be Back in 15 Minutes**

Four Steps to Operational Excellence



Select Appropriate Solutions

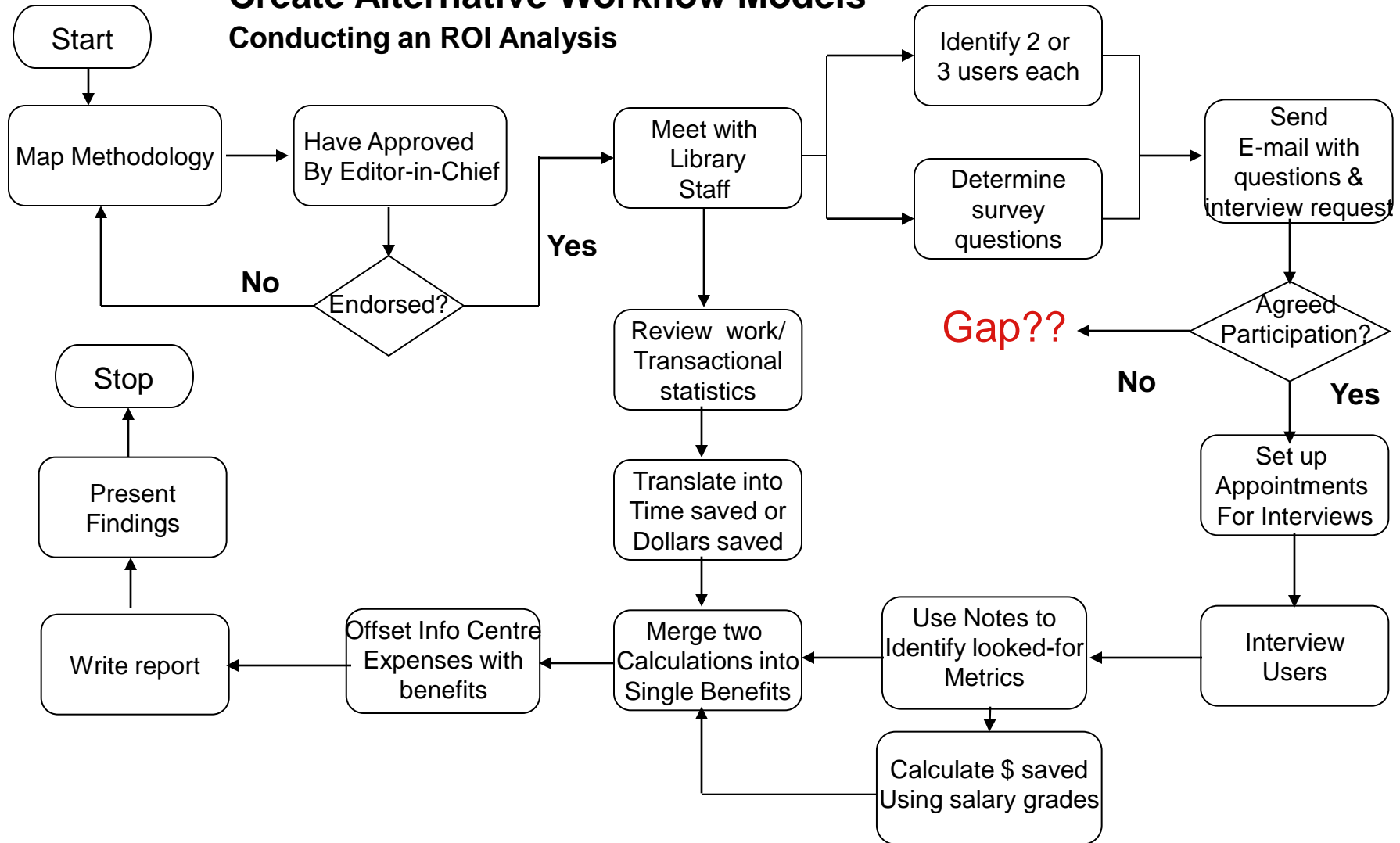
- Assess through financial lens
 - Costs

- Connect to benefits
 - For Organization
 - For Clients
 - For Information Centre staff

Step 4: Model Best Practices



Create Alternative Workflow Models Conducting an ROI Analysis



- **Top down**
 - Senior management support
- **Middle out**
 - Initiate projects within the Information Center to model best practices for select processes
 - Communicate benefits to all level of customers
 - Opportunity for marketing
- **Bottom up**
 - Clients identify the knowledge they need
 - Clients identify performance levels
 - Clients participate in the process

- Identify and publicize examples of business results supported by the project
 - Improved access to information
 - Reduced project cycle time
 - Cost savings
- Opportunity to partner with corporate communications

Objective:

Assess possible new best practice projects using situational examples from your own organizations. Your projects may involve:-

1. **Service levels** - best practice in setting target deadlines for handling information requests and prioritizing requests with differing target times
2. **Customer surveys** - best practice in obtaining feedback from customers on use of information services
3. **Content management** and/or vendor management—best practice in identifying, tracking, and distributing available content

Developing Better Practices

- Quantitative activities like benchmarking become more qualitative
 - Connect to morale and customer satisfaction
- Model best possible business practices
 - Create credibility to support others in like activities
- Assess best practices through a financial lens
 - Requires research of both organization and Information Centre
- Link Information Centre to senior management

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- Any questions?
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