

Success and the Embedded Librarian

EMBEDDED LIBRARIANS MUST DEVELOP STRONG RELATIONSHIPS WITH THEIR CUSTOMERS SO THEY CAN BETTER UNDERSTAND THE WORK CONTEXT AND CONTRIBUTE MORE RELEVANT AND VALUABLE SERVICES.

BY MARY TALLEY, MLS

In 2007, SLA presented a research grant to David Shumaker and Mary Talley for the purpose of identifying and studying the factors required for embedded librarian programs to become and remain successful. Through this project, the researchers hoped to gain a better understanding of the similarities and differences among embedded library services programs and develop insights into practices that enable them to succeed.

The project had four goals:

- To define criteria of “embeddedness” for library and information services programs;
- To define indicators of success and identify successful (model) programs;
- To collect data about the practices

followed by model programs in initiating, operating and evaluating their services; and

- To develop recommendations for other librarians seeking to implement embedded services.

The researchers submitted a final research report in 2009 and wrote an article about their findings for the January/February 2010 issue of *Information Outlook*. They then conducted further analyses of their findings in hopes of discovering fresh insights into the reasons why some embedded programs are more successful than others. In this issue, Talley will present her conclusions about the factors that drive success; in the June issue, Shumaker will present his.

What does it mean to be successful? How should success be measured and defined?

These questions were at the heart of the “Models of Embedded Librarianship” project that my colleague, Dave Shumaker, and I began in 2008. Our research culminated in a model for successful programs, which we published in our final research report in 2009 and in an article in *Information Outlook* (Shumaker and Talley 2010).

Given the volume of rich data produced by our research, we knew that we had only scratched the surface of the practices that lead to successful embedded programs. A year after publishing the final research report,

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we went back to our data to perform further analyses. The results provided fresh insights into the success factors for embedded librarians.

Defining Success

Even the simplest of library and information services programs have a difficult time defining success; the complexities of embedded programs make this task even more daunting. Such programs rarely have their own financial statements, and their impact on organizational financial outcomes can be indirect and diffuse.

In the first-stage analysis, we decided that the criteria for success should be measures of growth in embedded roles and programs. These measures included the following:

- Growth in the number of information professionals providing specialized services to a customer group;
- An increase in the demand for services from the customer group; and
- The development and delivery of new services to the customer group over time.

When we applied these measures to the data, two distinct groups of embedded professionals emerged: one reporting growth in all three areas (the high-growth group, which we labeled the Successful Group) and one reporting no growth in any of the three areas (the no-growth group, which we labeled the Less Successful Group). A statistical comparison between the two groups' survey responses produced 22 significant differences or characteristics ($p < 0.05$) that defined and separated the groups. The differences centered upon four major themes: management support, services provided, marketing and promotion, and service evaluation.

The practices associated with each theme formed the basis for our model of successful embedded programs.

Exploring Other Measures

In the second phase of our analysis, we focused on two other potential success measures: longevity and self-reported success. We surmised that information professionals in long-lived embedded roles and those with a very high self-assessment would behave differently than their shorter-lived and less highly-rated counterparts. We further speculated that the differences between them would be similar to the characteristics that separate the Successful Group from the Less-Successful Group.

To test these hypotheses, we first defined the factors for these two additional success measures. We agreed that those working in embedded roles established 10 or more years ago would constitute the Long-lived Group, while those in roles established within the past 10 years would constitute the Short-lived Group. We further agreed that those who rated the delivery of embedded information services to their customer segments as "very successful" would comprise the High Self-Assessment Group, while those who rated the delivery of these services as "successful" (or less satisfactory) would comprise the Other Self-Assessment Group.

We then re-analyzed the survey data for each measure, applying the same statistical technique (small-sample discrete inference based on mid-p-value) used in the original analysis, to look for statistically significant differences between the constituent groups. (Differences cited in the text are statistically significant at the $\alpha = 0.05$ level,

unless otherwise noted.)

What we found was somewhat surprising. Although the Long-lived Group did behave differently from the Short-lived Group, its characteristics more closely resembled those of the Less Successful Group than those of either the Successful or High Self-Assessment Groups. In contrast, the High Self-Assessment Group was more closely aligned with the Successful Group and even surpassed it in several significant areas.

When we compared similarities and differences among the three groups, we discovered fresh insights into how to be successful in embedded roles. Specifically, we identified two practices that matter: (1) relationship building and (2) work product, promotion and evaluation.

Relationship Building

Our research revealed that strong, reciprocal engagement between the embedded professional and all levels of the customer group was a significant feature of the Successful Group. We also found that 5 of the 22 practices we identified with the Successful Group related to management support and customer interaction. These practices include the following:

- Written work agreements with customer segments;
- Customer feedback in performance reviews;
- Customer manager support through integration of the embedded professional into the group; and
- A continuing education requirement related to the customer group's area of specialization.

Another characteristic of the Successful Group is that library management supports and encourages collaborative customer relationships. For instance, library managers in the Successful Group were more apt than the organization's executives to give the go-ahead to initiate specialized services. When we analyzed the High Self-Assessment Group and the Long-lived Group for characteristics related to management support and interaction,

we found the former group to have the most (both shared and unique), while the latter had the fewest.

The High Self-Assessment Group and the Successful Group shared all of the characteristics mentioned thus far, except written work agreements. Embedded professionals in the High Self-Assessment Group had several additional characteristics that pointed to their relationship-building skills. These characteristics were as follows:

- Meeting with customer segment management to discuss their information needs;
- Attending the same in-house subject courses as their customers; and
- Receiving reimbursement for the costs of attending conferences in the customer segment's field or subject area.

The Successful Group, on the other hand, exhibited only one relationship-building characteristic: providing training outside the library.

The High Self-Assessment Group surpassed the Successful Group in characteristics related to customer group interaction and management support, suggesting exceptionally strong ties to the customer group. For instance, among the members of the High Self-Assessment Group, the customer group was more likely than library management to have made the first move toward the embedded relationship and to have conducted the embedded librarian's performance review (not just provide feedback to it). In addition, the embedded professional typically submitted written or verbal reports to customer management.

We found less evidence of these connections between the Long-lived Group and its customer base. At the embedded professional level, the group had no attributes corresponding to relationship-building activities. At the management support level, the group's few related attributes were primarily in the form of support for formal education to expand domain knowledge, including a requirement for continuing education (shared with the other two groups) and tuition reimbursement (unique to this group).

The Long-lived Group's interactions with customer management also appeared to be more formal than those of other groups. These interactions included the following:

- Customer management authorizes the initiation of embedded services;
- Customer management does not support embedded professionals by integrating them into the team; and
- Embedded professionals are brought into the customer group at a lower level by a designated liaison or contact within the group.

We found that other attributes related to management support indicate that the Long-lived Group may be more strongly connected to library management than to its customer segments. For example, the group is more likely to provide reports to library management than to its customers, more likely to receive a performance review from a library manager than from the customer segment, and less likely to have the customer segment share any responsibility for performance review.

As a whole, these characteristics suggest that the Long-lived Group may have retained more of the traits of a traditional, library-centric role than either of the two other groups. In contrast, the management support and customer interaction characteristics of the Successful and High Self-Assessment Groups describe multiple pathways for communication and continuous, reciprocal engagement with the customer group. In the case of the High Self-Assessment Group, the presence of additional characteristics indicates that those who rate their embedded programs most highly are also the most firmly aligned with, and receive the most support from, their customer segments.

Work Product, Promotion, and Evaluation

A complex, value-added work product is a hallmark of embedded roles and arises from the collaborative relationships formed between the embedded information professional and the customer segment. It is not surprising, then, that five of the six work prod-

ucts associated with the Successful Group and all seven of those associated with the High Self-Assessment Group emphasize expert analysis and good judgment. Both groups deliver competitive intelligence and in-depth research work, and both groups' services include a training/educational component (the Successful Group also provides data analysis).

In contrast, the Long-lived Group had only two work products of any kind associated with it. One was a low-level service, the other a value-added service—shared instructional responsibility, which reflects the traditional librarian's role of instruction. The Long-lived Group also was significantly less likely to provide a number of high-level services, such as in-depth topical research, evaluating and synthesizing the literature, and data analysis.

The High Self-Assessment Group's work products stand out from those of the Successful and Long-lived Groups in several ways. First, this was the only group to have no low-level tasks associ-

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ated with it, such as document delivery (provided by the Successful Group) and ready reference (provided by the Long-lived Group). Second, it was the only group with technology-related tasks among its characteristics. These tasks are as follows:

- The development of structured databases;
- Manipulation of data using analytical software; and
- Management of computer networks and document repositories.

From this clustering of activities around high-value, nontraditional services, we get a clear picture of the transformation that is possible when an information professional's focus becomes more customer-centric.

Why wasn't the Long-lived Group engaged in more high-level work products, especially given that it had more time to develop them? It was not for lack of subject knowledge—this group was more likely than its peers to have a certification in the customer segment's field and to receive support for continuing education. It also was not for lack of marketing efforts. Although its characteristics included only one marketing activity—presentations at new employee orientations—this was also the only marketing activity associated with the High Self-Assessment Group, and it was shared by the Successful Group (a testament, perhaps, to its importance).

The Successful Group engaged in two additional marketing activities: word of mouth and distribution of print materials. The High Self-Assessment Group's limited use of promotional activities may indicate that it has integrated marketing into its day-to-day interactions

as a result of its strong collaborative work relationships, thereby reducing the need for more formal efforts.

Finally, the Long-lived Group's failure to produce complex work products was not the result of a lack of service evaluation. All three groups used metrics to evaluate and justify continuing their embedded programs. The Long-lived Group had only one attribute related to service evaluation—measuring financial impact on the organization's bottom line (e.g., cost savings and ROI)—but this may be the only metric that matters. It is the only metric shared by all three groups, indicating its importance in garnering support for embedded programs.

The Missing Element

What does it mean to be successful in an embedded role? To a large extent, success in an embedded role depends on the depth of engagement between the information professional and her customer segments and on the professional's ability to develop these connections. As the professional become more deeply embedded in the customer segment's work, her understanding of the work context grows, enabling her to contribute more relevant and valuable work.

This is corroborated by the practices associated with both the Successful Group and the High Self-Assessment Group. These practices describe a close working relationship with the customer segment as well as complex, value-added work products. These characteristics are even more pronounced in the High Self-Assessment Group, in which a strong customer-centric focus results in rewarding work that emphasizes expert

analysis and deployment of technology.

This appears to be the missing element in the Long-lived Group's profile. The Long-lived Group, at least in our study, did not seem to have cultivated connections with its customer segment to the same extent as the Successful and High Self-Assessment Groups. Consequently, it is not associated with the same high level of work. Endurance is admirable, but it may not always be enough to qualify an embedded program as completely successful.

REFERENCES

- Shumaker, D., and M. Talley. 2010. Models of embedded librarianship: A research summary. *Information Outlook*, 14(1): 27-28, 33-35.