



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

By Eddie Watkins

²
Quantum Whitepaper 14.06.06
Leadership Series: Perception Analysis

Abstract

End users increasingly search for information themselves, a trend that is pushing the information professional's role to the periphery of the organization. They 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 who is integral to the information workflows and decision making of an organization.

Introduction

Librarianship today is commonly held to be in crisis. 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 perception problem that devalues their competencies and limits the crucial role they play within their organizations. This traditional perception of information professionals, while no longer accurate, often creates a barrier between the library and the value they can bring to the rest of the organization.

Despite this problem, information professionals continue to add value to their respective organizations. In fact, their skills are more valuable and more necessary than ever in the face of information overload. Information professionals can bring calm and order to information chaos, and so must strive to shift this negative perception of their skills to 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." Both end users and decision makers need someone to help them navigate through the volumes of data for the precise information that will not only add value to the organization, but help speed the decision-making process.

Given that information professionals possess the unique skills necessary to lead organization-wide information management initiatives, they must bring those skills out of the library and become engaged in the processes and activities of the wider organization in order to transform perceptions of their role. By doing so, information professionals will prove their value, showing why the organization must have their services to succeed in today's competitive environment.

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 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 continually being closed — a clear statement that in some communities the library's operational costs are perceived as outweighing the value provided.

While these trends are alarming, 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, a great cry remains among many organizations, claiming 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, much less appropriate external information. These are exactly the problems that information professionals can help manage, yet they continue to operate on the periphery of many organizations, rather than moving into leadership roles.

It is surprising that many enterprises are only now discovering their many information silos. In some cases, these silos represent money wasted—one group has information that another needs to successfully meet enterprise goals or both groups purchase the same information twice, thus reducing possible economies of scale.

For information professionals, the key is to provide the tools and leadership to manage internal knowledge, as well as know when external information is needed. For example, if information is available in a certain silo, but key personnel are unaware of it, the latter group is required to re-create that information. Or, a team may spend time trying to locate information that can be easily accessed in the next building over. "We know it's there somewhere, but we can't find it!" But internal information management no longer consists of just cataloging, archiving, and locating information sources, tasks long within the domain of the librarian. Increasingly, 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. Management of information from this perspective is, indeed, an area of value that beckons the skilled information professional.

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 scholars, and it made the librarian an 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 publishing 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 encounter. Meanwhile, information professionals have the expertise necessary to overcome information overload by using their organization skills to afford consistent and reliable access. Therefore, what is needed is for information professionals to change perceptions about the value they can bring to the organization.

Information professionals are not presently leading organization-wide information management initiatives or providing the necessary guidance on information policy, as they should be. These activities are generally led by representatives from information technology groups, rather than those people who have both the training and skills to assume this powerful role in the success of the enterprise. And, while there are numerous information professionals who truly lead information management within their organizations, every area of an organization can benefit, directly or indirectly, from the helping hand of librarians. They need only explore their thinking for how to further invest in their organizations by driving innovation and offering added value services.

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, first by collaborating with all departments and then by leading the charge for information literacy, empowering end users with the ability to select the appropriate information sources for their specific needs.

Organizations have two main classes of customers — internal and external. While the most valuable external customers are usually explicitly identified, the internal customers are often only tacitly understood. On the other hand, libraries have another, high-value category of customers — senior management. Senior management often does not interact directly with the library. However, they do set budgets. And, senior managers also have their own, unique information needs.

To achieve the best results possible with the organization's resources, senior management is charged with the determination and execution of strategy. Now more than ever, they need

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. And you must educate others in your organization about what you can do for them. Interview your senior managers to determine their most pressing information needs, and then meet those needs.

Organizations often ask information professionals to track market forces, particularly competitors and the 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 frequently 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 fear of the consequences of not implementing, senior managers often make these investments, and then later regret them.

Over the years, a cycle for new information systems has emerged, as illustrated by trends like Y2K, Knowledge Management, Intranets, Extranets, Portals, e-Commerce, and so on:

1. Cutting edge system released to the market with some demonstration of a gain in competitive advantage for adopters
2. System adoption by other organizations to gain similar advantages and to keep up with technical developments — do not adequately identify how system addresses information need or workflow problem
3. Mass disillusionment ensues as solutions prove to be more expensive with fewer benefits than anticipated — new system often does not fit all organization needs, nor organization's culture
4. Resulting mass of publications decrying system as a waste of resources cause drop from collective radar
5. Moderate rebound occurs as organizations re-examine actual benefits and customize to optimize benefits
6. Content sought to populate solution and obtain value

Usually, it is the last phase of this cycle in which expertise of information professionals is engaged. Yet their inclusion at its inception could possibly forestall the potential waste of resources.

Senior management needs continuous support and information for existing decision support systems (DSS). This offers information professionals the opportunity to make truly strategic contributions to their organization, helping improve the work results of others. In addition to having a broader reach and effecting more strategic results 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, so now they deliberately seek out this information for study. Enterprise risk management requires that the executive team knows the organization’s “big picture”. To determine the big picture requires standardized data collection across the organization as well as a great amount of business knowledge. A well rounded information professional can offer immeasurable assistance with this new area, as their skills include common data formats, reference interviewing, and searching. These translate directly to the Sarbanes-Oxley requirements of legal responsibility of management for information accuracy and quality. 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 as their search expertise in technical content and determination of market opportunities would be valuable contributions in assessing ideas and making “go/no go” decisions.

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

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

Extend Value with Organizational Savvy

But how to make that value known? The concept of “marketing” comes with its own perceptions, both positive and negative. Because, for information professionals, 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 heretofore undiscovered needs. Therefore, 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. And these efforts are not broadcast to parties to whom your service is irrelevant.

High Value Service: The Personal Shopper Construct

Let’s look at a relatively typical mental model of an information professional as 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 contained within the document. 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.

So, perhaps its time for a new mental construct as a way to revolutionize the thinking of information professionals and the organizations they serve. Today’s information professionals have the opportunity to be their enterprises’ personal shoppers. 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 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. No customer likes every item and, if merchandise is particularly trendy, it may suit only a few shoppers when put on display.

So, why would a store hire personal shoppers in addition to buyers? After all, many customers are willing to visit store after store, preferring 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, personal shoppers with subject matter expertise are 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.

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, although he may be hired as a consultant for project work. The information professional proactively markets library services either to further top organizational priority projects or to end users who place a high value on this service, such as managers who are too busy to do it themselves.

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, a college class or even 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.

Given this plethora of information choices, let's contrast our initial model of an information professional with our construct of information professional as personal shopper. 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.

Conclusion

In conclusion, perhaps, “Strategic Information Consultant” seems to best convey the personal shopper concept as it was originally intended. Repositioning the information professional in this light can bring similar cachet to that of a personal shopper. How? Start by seeking out opportunities for the organization by tracking competitors and market opportunities. Assist with enterprise risk management by becoming familiar with the organization’s “big picture” strategy. Contribute to the company’s growth through innovation management, i.e., acting as a catalyst for the management of new ideas for growth opportunities.

Endnotes

Boike, Doug et al. “Trends and Drivers of Success in NPD Practices: Findings from the 2004 CPAS Survey.” Presented to the PDMA Carolinas Chapter, Cary, NC, November 17, 2005.

Davenport, Tom. 2003. A Measurable Proposal. *CIO*, June 1, 2003.

Hamm, Steve. 2006. Thinking the Future, with IBM. *BusinessWeek*, March 9, 2006.

Morville, Peter. *Ambient Findability*. O’Reilly Media, Inc., 2005.

Orna, Elizabeth. *Practical Information Policies, 2nd Edition*. Gower Publishing, Ltd. UK, 1999.

Schwartz, Barry. *The Paradox of Choice*. New York: HarperCollins Publishers, Inc., 2004.

Special Libraries Association [cited April 2006]; Core Competencies for Info Pros for 21st
Available from <http://www.sla.org/content/learn/comp2003/index.cfm>.

Walker, Paul. “ERM: Emerging Trends and Expectations. The Case for Innovation Management: Return to Profitable Growth.” Presented to the NCSU College of Management Symposium Raleigh, NC, October 21, 2005.

About the Author: Eddie Watkins joined Dialog in 1998 and has been the director of product development since November 2004. He is responsible for the overall management of the Dialog product line, including the development and launch of new products and product enhancements. He has led numerous successful product launches and projects, including the award-winning Dialog1, DialogPRO, and Dialog API as well as e-Journal linking, Chemical Abstracts linking, and most recently the launch of DialogLink 5, which includes chemical structure searching and XML workflow integration tools. His experience at Dialog spans eight years, starting as an information specialist in the Dialog Knowledge Center and then working as an intellectual property subject specialist before moving in to product development.

Eddie graduated with honors from North Carolina Central University in Durham, North Carolina, where he earned his master of library science degree with a concentration in special/corporate libraries. He holds a bachelor's degree in history from the University of North Carolina at Chapel Hill. He resides in Sanford, NC with his wife and two children. In his other life, he plays drums in an indie rock band.