Adapt, Act and Thrive: Ensuring a Sustainable Library

A round table discussion

The current information industry landscape is filled with challenges that require tangible solutions and present real opportunities for success when effectively confronted. Believing that librarians and knowledge managers can face these challenges to "Adapt, Act and Thrive," Lucidea convened a panel of visionary information professionals for a round table discussion at the 2014 Special Libraries Association conference. Panelists shared their best practices for:

- Embedding themselves within their organizations
- Demonstrating value
- Engaging end users
- Managing vendor relationships
- Ensuring and leveraging "info-ubiquity"

This session provided many tangible examples of how information professionals can adapt to challenges, act based on best practices and success stories, and thrive within their organizations and profession.

Lucidea's Six Principles framework (Access; Discovery; Independence; Integration; Security and Partnership) governs our business and client engagement philosophy and provides a critical filter for information professionals today as they look at their services, their impact, their resources and their sustainability. Joe Matthews, the moderator, used this Six Principles framework to structure and facilitate the panel discussion.

The panelists were:

- Judith Bloch, Corporate Librarian/Information Resources Manager, Shannon & Wilson, Inc.
- Joan Cunningham, Regional Librarian, Simpson Gumpertz & Heger
- Jennifer Hermsen, Manager, Knowledge Services, Kemin Industries, Inc.
- Karen McQuillen, Director Knowledge Services, ETS (Educational Testing Service)
- Susannah Tredwell, Manager of Library Services, Davis LLP.

Joe Matthews is a noted author of library management articles and books, and a former instructor at the San Jose State University School of Library and Information Science. He has consulted numerous academic, public and special libraries, and is a frequent conference speaker.

LUCIDEA'S SIX PRINCIPLES

When the Six Principles framework is used as the lens through which to look at library applications, services, products and outreach, it helps maintain a focused strategy and reinforces the importance of the library as a core function within the organization. Below is a brief description of the framework's components as applied to Lucidea's product development and client service strategy; later we will show how our panelists reinterpret the Six Principles and describe them within a library management context.

Access

Universal access to organizational information must incorporate web-based delivery, multi-browser compatibility, mobile device support, multiple channels, global coverage for multi-location organizations and 24/7/365 self-service.

Discovery

Powerful capabilities are fundamental to optimized content discovery. These include content curation, the ability to collect and leverage the wisdom of the community, and in addition, the ability for users to search, browse, receive alerts, leverage what they find, and act on content.

Independence

Technology related self-sufficiency and independence covers both the IT infrastructure (e.g. server configuration, maintenance and updates) and the application configuration and customization aspect. Vendor hosted solutions and intuitive administrative/ end user interfaces are key to library IT independence.

Integration

Knowledge management solutions should not dictate the way people work and how they do things. Solutions should integrate with existing systems and applications, leverage existing assets (including people and available information repositories), and must work seamlessly with the current IT infrastructure.

Security

Since universal access to organizational information is a must, secure access is critical. Comprehensive information security includes the ability to manage permissions for databases, records and fields. Security requires a high level of granularity, including role and user-based permissions, the ability to grant access to the right information by the right people at the right times, and rock solid internal data security.

Partnership

For a commercial relationship to flourish there must be mutual interest in success; both parties must work together to ensure ongoing achievement and results. Partnership includes a consultative and collaborative element.

PANEL INSIGHTS AND LESSONS LEARNED

The Panel acknowledged that there are threats to the success and sustainability of special libraries, and asserted that these threats can be proactively overcome if special librarians adopt a strategy that incorporates the Six Principles: Access; Discovery; Independence; Integration; Security and Partnership.

Challenging trends faced by librarians today include:

- third party content providers who reach out directly to end users
- the prevalence of social tools and users' need to act on content
- a requirement to support an increasingly mobile user base
- the need to integrate with other applications – within and outside your organization
- ever-shrinking budgets

In addition, competition from external search engines (i.e. Google) cannot be ignored. Information professionals know that Google is just a starting place and that search results must be carefully analyzed. Often, "information consumers" and end users may not understand the critical importance of curation by information and knowledge experts, which results in qualified, accurate content that is both relevant and current.

In the face of all these challenges librarians need comprehensive solutions and strategies that focus on building the "sustainable library." The panelists confirmed a strong connection between the Six Principles and the long term viability of special libraries. Our participants ensure the sustainability of their departments by emphasizing some or all of the principles, and offered tangible examples of success.

ACCESS in action

In a special library context, the concept of access certainly means the channels through which information flows and services are delivered - librarians can and should leverage the web, enterprise social media, mobile options for smartphones and tablets, and other delivery channels. Says Karen McQuillen, "Access also means

providing content and services via whichever methods make sense to users." Because people think and learn differently, per Susannah Tredwell it's important to "offer multiple paths to the same information" so that people can find it however they prefer to do so.

Panelists stressed the importance of "continuing the dialogue;" saying that librarians must build their presence wherever their users already see and expect value. For example, this might mean having a daily presence on the corporate intranet, which is often the first place a person goes as they start their work day. All our panelists mentioned either that they publish a daily library newsletter on the intranet, or that they use it to promote library events such as webinars or tours, or per Judith Bloch that they offer "canned" frequently used searches under a library tab on the intranet … meaning that users don't have to go to the catalog to get help from the library. Library service is not outside their workflow; it's integrated (another one of the Six Principles).

Great customer service includes providing easy access to information, library products and research assistance, and in the end, as pointed out by Jennifer Hermsen, "People have to like using your services and tools." Whatever you can do to make it fun and to continue a conversation your end users are already having is a basic but important best practice.

DISCOVERY
– strategic serendipity

Sheer quantity of information – whether physical or digital, is growing at a phenomenal rate. Simple search is often no longer sufficiently powerful (or subtle) enough to sift through all that content and deliver targeted results and the old adage "too much of a good thing" may certainly apply. More isn't necessarily better and users frequently suffer from the "don't know what they don't know" syndrome, failing to benefit from valuable content for which they didn't even know to search. There are methods, techniques and/ or technologies that librarians can leverage to ensure critical information is "discoverable," especially to those who may not know the information even exists.

Going beyond search and enabling discovery requires a solid understanding of users' needs, preferences and behaviors. Analytics are critical - several panelists mentioned that they routinely use Google Analytics to find out where their users are located, who their most frequent users are, what paths they take to specific information, how often they use certain tools, and what content they view or download most frequently. Request tracking databases are very useful for uncovering

resource and knowledge gaps, under-supported practice areas or underutilized content. Additionally, judicious application of surveys can capture information that helps library managers develop a double pronged approach – being both reactive and proactive when developing discovery mechanisms. Panelists also cautioned "Don't survey too often, don't ask more than 5 questions, and if possible, integrate with pre-existing internal surveys and contribute a library question set."

There are several strategic elements to enabling discovery. For example, the library catalog must be seamlessly integrated with the library portal and/or corporate intranet so as to offer content in context. Determining what leadership believes is the most critical organizational information and then piggybacking on it to feed the library database is also critically important. Judith Bloch mentioned that she and her team indexed 60 years' worth of engineering project files, which is the content that makes her firm "special," and as an important benefit of using their automated system (Lucidea's CuadraSTAR) for this effort, they "jump started" the library catalog and many other important library initiatives. Just as offering many routes to the same information enhances access, offering many levels of content enhances discovery: it allows users to drill down, from an executive summary, to a 5 pager, or a 30 pager and to find valuable information they didn't even know they needed. A subject matter expert in the library might build and curate collections of practice or department resources using this framework, and link the in depth materials to the summaries.

Finally, there are functions available within excellent library automation and knowledge management platforms that facilitate discovery, such as faceted searching, tagging, linking, natural language search, alerts and RSS feeds, along with enterprise social capabilities such as "liking" and "commenting" which allow librarians and end users to leverage the wisdom of the community. Discovery is actualized when critical information is revealed through multiple methods: structured, guided, or expansive.

INDEPENDENCE
– control is not a bad word

Being dependent on other departments or individuals can easily slow projects down - information professionals need to recognize and account for interdependencies in the organization that may inhibit productivity, and devise strategies for moving away from them. For example, the ability to configure and customize library software without relying on IT (or on the availability of IT when they have competing

priorities), to demonstrate ROI (usage, cost reduction, etc.) and to offer tools with minimal training required are all critical to controlling departmental progress and reputation.

One panelist suggested that the order of priority for the IT department is CRM>>VPN>>ERP...with library support a distant fourth. Jennifer Hermsen said "You have to establish credibility with IT if you want priority. They don't understand retention schedules or taxonomies, and they don't need to care."   Establishing credibility might include presenting use cases and/or business cases because they are familiar with that methodology as a justification for new IT projects. However, the bottom line is, "If you don't need IT intervention that's even better…" Per our panelists, if you can "go DIY" or outsource projects to a vendor who you trust and with whom you have a great partnership, that's optimal.

One way to earn independence is by demonstrating a great ROI (return on investment), which can be done through regular collection of metrics on readership, resource usage, and results, and use of them for managerial reporting. Once credibility with regard to operational efficiency is established, enlist the help of leadership to get the assistance needed from other departments, and speak with confidence, knowing there is solid data to support requirements.

Leveraging tools that require minimal training for library staff is clearly great for departmental productivity, but remember too that facilitating independence for end users and "information consumers" is equally important and valuable. Providing them with desktop tools that are intuitive and easy to use is priceless.

INTEGRATION
– success is the sum of the parts

With so many productivity enhancing technologies available today, a key challenge is the integration of library resources with other internal systems, whether those are financial, or HR related for example. It can be very powerful to integrate with 3rd party products or even applications that were built for purpose in-house and our panelists reported that these types of projects could really cement a good relationship with the IT department. At Judith Bloch's firm, Shannon & Wilson Inc., a very powerful integration they are considering is an engineering projects database that could be synchronized with the accounting system – engineers could run reports on similar projects and compare how much was spent and earned in order to benchmark and scope their work. Per Susannah Tredwell, any productive integration with existing accounting systems is always

great because accounting is so important within an organization and is always a priority.

Another type of integration that is incredibly useful is single sign on (SSO) where one set of login credentials allows end users to access all the applications relevant to their projects once they are on the network. This makes password management a breeze for individuals and for IT staff. When library staff have been involved in a single sign on project, or with any other project that enhances end user productivity and workflow integration, it's important to publicize that and get the appropriate attribution. Don't just market services, market successes.

SECURITY
– unauthorized access? Not on the library's watch!

There have been so many instances of security breaches in the news that most organizations are more concerned than ever about their own information security, especially where client or financial data is concerned. The security of the information in library and knowledge management systems is equally important since it represents a company's intellectual property and unique information assets.   Information professional must play a role in providing tools that offer accessibility and ease of use while protecting organizational information from unauthorized access.

When building a library or information portal, there are several types of security that can be implemented. Permissions management down to the data and record level is a base requirement, but there must be field level security as well. Single sign on is another element of an information security strategy, in part because it allows the IT department to quickly cancel one set of login credentials if unauthorized access occurs.

The security of information in the cloud is a growing concern to many senior leaders, including corporate counsel. Some organizations leverage cloud-based applications, but do not include client or financial information in what is stored. Others avoid the cloud entirely, keeping everything behind the firewall. It's critical that library managers are familiar with their organizations' information security policies, that they stay abreast of trends in this area, that they leverage only library applications with rock solid security that gets down to a very granular level, and that they work closely with their IT departments to implement permissions and data management methods that satisfy senior leaders.

PARTNERSHIP
– inside, outside, unexpected

There are several types of partnerships that are equally important to the sustainability of special libraries. Vendor partnerships that are consultative and collaborative are essential, as are interdepartmental partnerships, most especially with IT. Finally, partnerships with individuals both inside and outside the organization are critical, especially when they are "influencers" and can help get things done. These individuals aren't always part of the senior management team but can be of benefit to the library in unexpected ways.

Librarians and knowledge managers all have relationships with vendors, but not all of them are mutually beneficial. Such a thing is definitely possible, and our panelists shared some success factors for fostering true partnership.

As with any successful relationship, integrity, good communication and facilitation are essential. For example, if library managers are transparent about budgetary constraints, library automation vendors can often help accommodate them. They tend to be solutions oriented, and because of their broad client base they've seen what works at other organizations and can share that information. They can even help benchmark expenditures and return on investment, given their experience with similarly sized companies. In exchange, library managers can facilitate relationships between vendors and internal IT staff, leading to efficient implementation and rapid troubleshooting. In addition, if vendor selection was partly based on demonstrated innovation, the account manager can help clients keep on trend with technology, and the IT department will benefit.

Interdepartmental partnerships can be extremely productive. Jennifer Hermsen makes it a practice to read all the departmental strategic plans and partner with department leaders to build resource collections that will support their strategies. This is great customer service, and helps ensure that the budget is there because it clearly demonstrates that the funding supports two departments.

Karen McQuillen spoke about their Projects Database of all ETS authors and publications. This database is the result of a partnership between the IT, Communications, Public Affairs, R&D departments and the Library. If ETS authors want credit for their work, they are responsible for making sure their publications get in the database. Not only is this a great interdepartmental project, it reflects best practice in terms of getting end user participation – the desire to be known for thought

leadership is a great motivator.

Individuals inside the company can offer strong library advocacy, praising and publicizing services and impact, and helping to ensure sufficient resources and long term departmental sustainability. It's very important to build relationships with patrons because as Judith Bloch pointed out, they "funnel positive comments upward." Many organizations take a formal approach to library advocacy and management via a Library Committee, and in the case of professional services or law firms, a Library Partner. It's important to take advantage of this opportunity because it helps ensure that the library's products and services are always tightly aligned and integrated with the company's mission and business strategy. In good times this results in generous budgets, professional respect, and favorable press as an organizational asset (sometimes even as part of the benefits mentioned to recruits), and in bad times it results in a seat at the table when belt tightening or cuts are discussed. Any support department manager must learn how to speak the language of top leadership; the library is no exception.

One nontraditional partnership that yields unexpected benefits is the direct client relationship. Some library managers are able to offer products and services directly to clients, and often become invaluable client team members with strong external advocates. Our panelists indicated that these types of engagements are mostly "one-offs," but in the case of law firm extranets that are populated by the library, for example, there are long term relationships. If firm policy allows, these can even be revenue generating, which is yet another indicator of library value. With today's trend toward small staffs running big libraries, it can be challenging to support direct client service...but a successful "one-off" project can help make the case for additional staff, as can a demonstrated contribution to client extranets.

ESSENTIALS

Activities that librarians and knowledge managers must undertake in order to remain relevant and be viewed as essential fall into three categories: measurement, marketing, and customer service. Each of these can incorporate one or more of the Six Principles. As our panelists helped us to see, the importance of analytics cannot be overstated. There are many tools to help with this, including those offered by HubSpot, SharePoint and Google, and some library automation platforms such as Inmagic's Presto offer analytics capabilities as well. Use the results to manage collections, push services, target geographies within a global company, or offer better support to underserved practices or departments. Enlist the help of leadership:

if a project is business critical, such as a sales generation newsletter, collect and share metrics on readership and results with management; they'll feel informed and comfortable as advocates.

Marketing the library includes reminding users of services and products at every opportunity, leveraging channels they already use, such as the corporate intranet. At Joan Cunningham's firm, it includes significant involvement in new hire orientations, one-on-one training, and development of "just in time" how-to media such as video clips (which per Joe Matthews need to be 2 minutes or less in order to keep the viewers' attention). Joan and her team offer on-demand assistance for their occasional users, who may forget how to access specific resources when several months go by in between library visits, and for remote users, desktop sharing is a great way to offer support.

Regular presentations at sales meetings, marketing meetings, training sessions and IT department meetings are essential for library marketing, and result in the kind of integration that allows proactive development of products and services. These are also good venues to publicize success and demonstrate relevance or impact. Did the librarians' work help win a case? Did it help make a sale? Did it solve a client problem? Did the department make or save money for the company?

Per our panelists, "Where [the library] reports is very material," and marketing efforts can help enhance an existing reporting relationship or build a new one. The bottom line is, leaders prefer to manage thriving departments and they appreciate evidence of success. According to our panelists, "What [the library] is organizationally aligned with really matters." If it reports to marketing it gets more money. If it reports to IT there is better IT support. Reporting to a Learning Officer can emphasize non-traditional library services and impact. Finally, it's always better to report to a corporate group rather than to a local office because of the direct exposure to top level leadership and company strategy.

The moderator's final question of our panelists was, "If you had no staff, what would you maintain?" Although there are many solo librarians who do "adapt, act and thrive" it's impossible to imagine supporting a very large, global organization with no staff. Interestingly, though, the question got everyone focused on customer service, with rapid fire answers of:

- Ensure global access
- Enable self-service (while keeping service)
- Keep content current and the catalog up to date

- Go where your users see value
- Work backward from users' deadlines
- Manage expectations
- Define what "urgent" and "non-urgent" actually mean to the requester
- Executive requests "go to the top"

It was also mentioned that even (or perhaps especially) with the thinnest of bandwidth, maintaining interdepartmental relationships is critical. The discussion of customer service also included practical specifics, such as "if a question is asked more than twice, add it to the FAQ and publicize the FAQ." Everyone agreed that no matter what, it's important to keep the people element, noting such things as the generational difference in the requester population which dictates that librarians must be willing to be "two-tiered" in their approach with regard to training and tools.

IN CONCLUSION...

As the panel discussion reinforced, it's clear that the Six Principles are woven throughout the essential activities in which librarians engage, almost as part of their DNA. We believe that with continued focus on access; discovery; independence; integration; security and partnership, special libraries all around the world can "Adapt, Act and Thrive."