Elsevier Library Connect Webinar

Capturing and Communicating the Value of Information Management Services in a Corporate Culture

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Introduction: The IM’s Career Surprise

- “If I’d known how much ‘selling’ is necessary ...”
- “I’m stunned how much time I need to spend on just explaining ...”
- “Relationship Management was not a course in my program. It should have been ...”
Context: The IM’s Challenges

• “Everyone knows how to do research. Why would we need specialists?”

• “All the information I need is out there. Why would we pay so much for subscriptions?”

• “Back in the day, no doubt the IM role was justified. But now ...?”

• “What’s the problem? We’re doing OK, aren’t we?”
Challenges, cont’d

• IMs experience they “can’t even get to perform their professional craft” until they have overcome the barrier of (mis)perception

• In this “new normal”, outstanding professional qualifications are not enough

• Rather, outreach and consultative promotion ARE a part of the job
What are Our Strategic Options for Tackling the Challenges?

1. Understanding culture
2. Selling by telling: Gauging impact, spreading the word
3. Managing relationships for lasting advocacy
4. Connecting IM investment to the business of the business
5. Being on the lookout for value-add opportunities
Understanding is the First Step

- Knowing what behaviors are rewarded/tolerated is the foundation for understanding what is valued.
- Getting to know the business teams’ members and their activities is essential.
- What are they doing? What are they up against? What constitutes success for them? What kinds of budgets are involved?
- Such insight + strong industry/sector knowledge are prerequisites for meaningful conversation.
How Well do We Know ...?

- Make a mental map of the organization and assess the details known about users and non-users
- What groups do we need to know more about in order to prioritize our strategic efforts?
- The aim is to ensure we don’t under/overserve certain groups in light of their importance for the organization’s priorities
Next, Understanding *Info* Culture

- What is the view of “good information practices” in the business teams?

- “Good enough is good enough” ... or “around here, we do it right ... the first time”?

- The rigor with which ‘information behaviors’ are practiced is a key indicator
Time for the Information Audit

• Er, I meant of course the strategic information requirements assessment ...

• ... a prime tool for IMs in gathering data and insight ...

• Possibly positioned as a measure to strategically allocate the IM budget
Handy IA How-To

- Chapter 3 in *Knowledge Management Practice in Organizations* (IGI Global) – download from pubs tab at author website shamelinfo.com

- Covers senior management buy-in and options for the practical steps

- Scope may vary from 1 target business team to full organization depending on overall goal

- Note: *Not* an exercise in “rate the IM on a scale of 1-10” (though we gather input of course)
Key Takeaways from IA

• What are the team members currently doing to get/apply/share/keep the information they need?

• What sources are consulted? Is it anyone for himself/herself, or is there an ‘information person’ (formal or informal)? How much time is spent “looking around for info”? How sure are team members they got “all the good stuff”?

• What gaps/bottlenecks/challenges are experienced – in their own words, or by our diagnosis? What’s working well?
The IA takeaways help us confirm or redirect current service emphasis – to ensure it is aligned with and supports business direction and priorities (always need to stress/document such alignment)

AND the IA sets the tone for any required future outreach to establish the business impact of services/tools provided ... a good reason to choose an in-person method

IA may provide great initial stories to tell
One Key Concern

• “I couldn’t impose on the business teams to participate in an IA” is a frequent worry

• It is essential to position participation as an investment in better outcomes for the teams

• “Your input will pay off for the team in ensuring we may enhance/increase/fine tune/allocate budget ... to support your projects”

• If available, an invitation to participate from a senior executive is ideal: “Please ensure you provide your input in this overall effort to optimize business processes”
2. Selling by Telling: Gauging *Impact*

- No surprise: Usage stats do not tell the full story. In fact, they may simply raise “Is that a good number? What happened as a result of those 10,000 hits?”

- Budget decision makers want to know “what did we get for the money?”

- Usage story comes from the IM ... impact story comes from the business teams

- But unless we solicit it, it will never be told (unless we have extremely proactive fans out there)
Getting the Stories

• Therefore, we systematically follow up:
• What happened when you *did* have right info etc?
• What happened when you *did not*?

• “What happened” =
• What was the business impact?
• What decisions did you make/cancel?
• Did you change direction/priority?
• Your estimate of gain/loss/risk to organization?
• What will you do differently next time?
Spreading the Word

• Buzz is the IM’s friend:

• Newsletter feature?
• Business story of the month? (*Their voices speak*)
• Teaser tweets? (“You won’t believe …”)
• Internal social media tools?
• Cavalcade on IM intranet page?

• We establish that of course, the IA is a regular and profitable event for the organization (“the annual …”)

• The importance of having opinion leaders on side becomes obvious …
3. Managing Relationships

- Social capital is the holy grail

- Personal professional relationships are a powerful enabler of getting the word out (not to mention support in cases of e.g. looming budget cuts)

- But ... I have work to do!

- Psst: If relationships are not managed, there may soon be no work to do ... do not blanch at spending a large percentage of time on them
How to “Manage” Relationships?

• We manage resources, budgets, projects ... why would relationships be different?

• Yes, it’s systematic ... that does not make it cold or calculating!

• Outreach is not an intrusion ... especially not when we’re armed with the stories (as in “we can help you just as we helped the X team”) 

• In fact, it’s our professional responsibility!
Aha! Professional Responsibility!

- So ... we’re not imposing ... we’re supporting and enabling the organization’s priorities!

- It’s never “our resources/services are dynamite” (though of course they are!)

- It’s always “we (continue to) support/enhance/ensure/advance/reduce risk ... [involve name of priority team project] and hence ...”

- That’s why we needed the IA and the stories ... to get around the fear of sounding self serving
It’s not about my Job ...  
It’s about Yours!

- Many IMs fear promotion could look like an effort at protecting our jobs. Nothing of the kind.

- The conversation is entirely about THEM: *Their* project needs, deadlines, etc.

- We professionally take ourselves out of the equation. That is how we solve the “but I can’t just butt in” conundrum.
Like Housework, it’s Never Done

- No sooner have we secured the alliance of key people ... they move on!

- Hence the need for **systematic** and **scheduled** relationship management

- “The annual (or periodic) ...” is a good way to port social capital to a new incumbent (always refer to the interaction as being regular and normal)
4. We get to Connect IM to the Business

- With all this knowledge, we are now in a position ...
- To relate information practices to the organization’s business activities
- By expressing the *relationship* between investment and outcome
The “Pennies a Day” Approach

- Insurance ads have it down: “Protect your family for only ...”

- What is the enterprise spending per employee on mobile devices? Accounting? HR? (Etc)

- How “expensive” is IM when compared to such functions – in light of the outcomes/risk protection we just discussed?

- “If you think education is expensive, try ignorance”
The “Hours Wasted per Week” Approach

- Remember the “how much time is spent looking around for info or asking colleagues if they remember where ...” data we got in the IA?

- Let’s see, multiplied by the salaries ... that’s a pretty penny to pay PhDs to not do their ‘real’ work

- Especially when the IM finds better info in much less time

- There’s a story in the monetary value of the hours saved by subject matter specialists

- Never mind about the “projects that had to be done over because we didn’t have all the info” scenario!
The “How Much Risk Can you Tolerate” Approach

- Remember the detail we got in the IA about the projects under way?
- Let’s see, how much risk/exposure is attached to being without critical information?
- What is it “worth” to the teams to be certain they have invested in maximum protection or competitive advantage?
- There’s a story in the monetary value of not taking unnecessary risk
The Approach Depends on Overall Organizational Drivers

- Our choice of message is guided by our understanding of “how they see it”
- Clues may be found in overall organizational strategic and business plans
- Owners of initiatives of high visibility, for instance, may be receptive because of the general distaste for failure or damage to reputation
- Our approach may change over time as the organization evolves
5. On the Lookout

- During all the ‘getting to know you’ activity, we may come across projects and activities in which our skills are relevant.
- Databases, portals, archives, intranets, social media ... stuff the teams are doing with internal data & knowledge - unaware they could have us on the team.
- Yes, that’s stepping outside the formal job description ... or is it? Is the job description a tad outdated?
- See Chapter 5 in Career Confidential.
On the Lookout, cont’d

• What can the IM do for the harried subject matter experts?

• Oh, perhaps a current awareness service might eliminate flurries of “did you see this article” emails?

• Worse, what if the SMEs don’t send such emails because they believe “everybody knows”? 
On the Lookout, cont’d

• Did we discover the call center agents have a hard time with calls regarding newly released products?
• Ah, it’s a small matter to connect the packaging department with the center!

• Did we find out the teams spend a LOT of time on onboarding new employees?
• Isn’t documentation one of our key skills?

• There’s an information angle everywhere we look!
It May not Feel Natural at First

• But it becomes easier with practice!
Thank You!

Attendees are welcome to be in touch with any questions ...

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