Organizational operations:
The information professional’s opportunity to add value

In Chapter 4, we looked at nontraditional roles information professionals can fill. Here, we discuss opportunities information professionals may uncover once they are working inside an organization. All enterprises contain information-centric functions, and information professionals have a great deal to offer to those working in such functions. Our task is to identify the opportunities and be ready to demonstrate our relevance should it happen that our current role gets phased out.

The small essays below are intended to illustrate how typical organizational activities present situations we may use as inspiration for proposals to enhance business operations (not to mention our own careers).

Note that the term “knowledge worker” refers to someone with an information- and knowledge-focused job or a subject matter expert whose functions are intellectual in nature.

5.1 Managing knowledge worker information supply is a challenge—Get information professionals on it

In my consulting work—assisting clients determine the optimal strategies for supporting knowledge workers—I often see that an information professional (or three, or more, depending on the size of the organization) could be a significant value add … within the business teams or close to them. Yet, as the number of roles for information professionals as embedded (or portfolio) researchers and information consultants is modest, it is particularly important for information professionals to have practiced the “scary stuff” of business cases, ROI assessments, and similar analyses so as to sell their skills into new roles. In other words, information professionals face an employment landscape in which they are in effect required to sell potential employers on the desirability of creating new positions where unique information skills will contribute to organizational goals. Established information center managers are similarly required to demonstrate the value and ROI of the infrastructure costs they incur for the parent organization; they are in effect becoming agents for hiring and deploying information professionals working directly with subject matter experts. Scary, yes; doable, yes.

What can information professionals do for knowledge workers who are run off their feet, arrive late to meetings because they were held up in a previous one, have their gadgets go off every few minutes, and so on? (No wonder stress levels are off the chart, but that’s another conversation.) The challenges for information professionals supporting client populations bombarded with all the flashing and beeping add
up: it may be difficult even to get enough of our clients’ time to find out what they’re up to in their work so we can diagnose needs and design services to match; our messages may be lost in the stream of other messages arriving on their screens and devices; and they may be forced to make do with what they can find quickly because the deadline is 20 minutes away. My modest proposal in that context—built on the evolution of our roles from service providers to business partners—is simple, though likely not so simple to implement. It follows the philosophy that preparation, planning, and contextual knowledge pay off.

It is unrealistic to expect knowledge workers to consult with information professionals day to day, but another type of relationship is worth considering: when information professionals are briefed as to a team’s upcoming projects, they are in a position (1) to prepare “backgrounders” to relieve the team members of the effort associated with foundational research, and (2) to monitor for and supply highly targeted notifications of new material of potential interest. There is no point in joining the barrage our clients deal with every day … our job is to reach them just in time with just the material they need to avoid spending any more of their precious time than they must in that noisy place. Imagine that—they are equipped with the latest in technology and tools, and our aim is to provide our clients a refuge from it all!

5.2 Working with reality: Things have changed … so can we

A colleague recently commented on the telling implication in being asked “why are you not more distressed at the closure of the organization’s library and the placement of the librarians in the research department?” My colleague is known for pragmatism and for a constructive attitude focusing on bringing to bear available resources on the most important challenges; so we naturally discussed the obvious opportunity inherent in any librarian’s move into close proximity with employees having knowledge intensive jobs. The closure of a library is never something we greet with joy (being who we are), but it is a reality that decision makers’ priorities and perceptions of value will drive their dispositions. The focus of effort—in the situation at hand—must now be on diagnosing and then delivering what will provide most value for the knowledge workers’ projects … library or no library.

Times have changed; let us accept and work within the fact that what in our view may not be ideal is perfectly normal to others. Let us find out as much as we can about the priority activities in the organizations we serve and then devise and promote the optimal mix of services, tools, and content to support those activities. A shift from brokering content and offering traditional research support in assisting knowledge workers navigate internal information holdings and finding their way to the right expert when needed could be a simple example of such a reorientation. Something as relatively straightforward (for us) as curating project-related materials or revamping an intranet interface for greater usability could yield practical value in short order … but we must get to the point of accepting that yes, we are in that business now: anyone
with LIS credentials is potentially “in the business” of working with any process, system, or tool an organization uses to support its operations. Our skills are applicable universally to today’s evolving business practices … we just need to acknowledge that fact and turn that acknowledgement to good use. What we may all wish, of course, is that the organizations we serve will each have a strong definition of what knowledge management means to it. If we know clearly how an organization and a team within it sees its knowledge-centric functions, we may in turn articulate how our capabilities could be most productively applied. The process of determining how the clients we serve define for themselves the meaning and applications of knowledge management … would be a good place for our newly “displaced” librarians to start.

5.3 Precious time: Limiting waste

Over the years, many studies have been conducted to chart the time knowledge workers spend on their various tasks—with a view to diagnosing opportunities for productivity enhancement. Questions include:

- How many professionals report that they spend a lot of time sifting through irrelevant information to find what they need? How many wish they could spend less time handling information volume and more time using the information that comes their way?
- Workers typically admit that not being able to find relevant information when needed impedes their productivity, just as they indicate an overall despair at the ever higher “information tsunamis.”
- How much time does a knowledge worker spend asking around (who could I be speaking to about X?), attending meetings, and searching for previously created documents?
- How could more time be freed up from hunting for information so as to be devoted to thought, analysis, and creative proposals? It is no wonder knowledge workers are stressed if a majority of their time is spent hunting for information or being in meetings (another form of information work, but one whose productivity varies). Assistance in managing the flow of information—so they can apply their expertise in pursuit of the organization’s goals—is required … but how? Is the solution to be found in technology? Information professionals offer to help establish a reasonable flow of relevant information, using their tricks of the trade. With every reduction in the typical knowledge worker’s time spent in unproductive information seeking, they contribute value.

Information professionals may benefit their careers by paying attention to such questions and similar ones and then deriving strategic approaches to offer to their employers.

5.4 But there’s more. What about all the information NOT present?

I recall several fascinating (read scary) anecdotes how manufacturing companies had to invest vast quantities of man hours—and suffer the resulting customer perception damage—in reproducing or repackaging product … not because of external calamity,
but merely because a key information item was left out of instructions or because an
outdated manual was referred to in the absence of awareness a newer one was available.
Yes, documentation and procedure manuals are a challenge: difficult to prepare, never
mind keep up to date (e.g., because on-the-floor changes in procedure or customer input
may not have a vehicle for being communicated to the documentalists reliably), they
are sometimes just as difficult for employees to consult conveniently. The impact may
be “limited” to needless expense in extra work, delayed shipments, and the like … but
consider that in some cases, public and personal safety could be involved as well. In the
anecdotes, significant losses ensued from something as simple as the lack of a business
process documentalist and/or the necessary rigor in (1) keeping process manuals accurate
and up to date and (2) making it easy and unavoidable for employees to consult them.

My experience tells me such a scenario is sadly common—in private and public
sectors alike. The question, as always, is: How can we promote the understanding and
the organizational culture that investment in good information practice and culture is
worth it … if not now, then at some point in the future?

5.5 Can our potential clients even hear us?

We live in an “attention economy” and in a “self-service culture.” Bombarded by in-
puts all day long, our potential clients (be they employers or stakeholders who could
benefit from our services) may never discover the value of what we can offer them;
and—worse—what they can’t imagine, they can’t ask for. There is a perfect match
between “what they need” and “what we can do”—but the perceptual gap is huge.

Hence our enduring challenge is to describe our services in ways our clients find
meaningful. Our words must resonate with employers or members of a community
(what’s in it for us?). To that end, we must know everything we can about their needs
and pain points—so that we can speak to them directly and with relevance, in language
they understand. Some say it’s a learning curve to drop the professional jargon—I say
it’s a matter of keeping our work particulars to ourselves. No one cares that (or how)
we do content management—but our clients do care about the outcomes: “Save time
by … Reduce risk by … Get homework help for your children by … [etc. etc.].”

We must fundamentally examine our activities and let go of ones no longer serv-
ing the priority needs of our target audiences. It does not matter how expertly we do
X … if X is not high on the list of our clients’ needs! Our highest goal is “knowing
and reaching the customers—on their terms.” Nothing new here … it’s just that it’s a
harder goal to reach nowadays when our voices are but a few among the thousands our
clients hear every day in their electronic din.

5.6 The cost of thinking “everyone knows”

“I’ll see you for coffee at 3 o’clock in Timmie’s!” Now, Canada sports among its cof-
fee house chains Tim Hortons and Timothy’s World Coffee … so you already guessed
I waited in the one, she in the other. We could afford to laugh about how easily
small ambiguities do in fact lead to tangible consequences (for librarians, no less!).
In corporate settings, this very phenomenon of “assumed information” is no cause for laughter. It presents considerable risk and waste of time:

- Filings after February last year were coded in a different way so we split the database rather than recode … everybody knows. Except the latest-to-arrive team member who for a time could assume there isn’t any data prior to March last year!
- Everyone knows “the way we distinguish between emails and memos” because of the records management system implications. Ah, no, the summer intern can’t—if there is not an easily found and clearly labeled document setting out the criteria and the treatment rules.
- Two departments have historically had different vocabularies for some similar activities they track. Over time, staff compensate for such differences by memory … but as time goes on, it becomes clear we miss relevant documents in each department because of the differences in terminology.

You could add your own examples how “assumed knowledge” is not “universal knowledge”—and how as a consequence investigation is needed and time gets wasted, for example, tracking down “why the items from the subcommittee were not included in the list” (because A thought B knew to retrieve them from C database as they were not included in D repository owing to the changeover to a new corporate documentation system).

It is an information professional’s contribution to any organization that he or she discovers, and remedies, such “assumed knowledge” risks. Signage, links, lists, intranet design, database structures, taxonomies, and other coding schemes … whatever it takes, information professionals are ready to protect against the corporate cost of “oh, you didn’t know …?”.

5.7 The incredible value of contextual knowledge

Someone unfamiliar with winter weather in Copenhagen may check the data and understandably conclude that with Fahrenheit temperatures in the 40s and occasional showers, a light coat and umbrella will do for a visit. Without the extra knowledge from someone who has spent time there, discomfort could result: *Ah, that coat would be insufficient—you need something to protect against the bone-chilling dampness, the unrelenting whipping wind, and the miserable sideways rain. Don’t count on your visit to include the few gust-free and dry days Copenhagen gets in January!* We could not expect weather data providers to capture such experiential recommendations systematically.

Vacation packing mistakes are quickly remedied through a visit to a store … but for organizations working to harness intellectual capital, solutions to challenges involving “clothing up the naked data” are more elusive.

Difficult to capture because it is awkward if not impossible to classify and codify for future access in practical ways, extra or contextual knowledge can nevertheless be worth a fortune in saved time and avoided trouble if it surfaces at the right time. Just think how often you may have heard statements similar to:

- “Where I worked previously, we used that product and found …”
- “Several speakers at the conference I attended last month called to attention how there’s more to it than what you read in the literature about …”
• “I hear so many good things about this small company from colleagues in other firms, perhaps we should look into …”
• “Didn’t this proposal come up a while back? If I remember correctly, there was a situation where …”
• “If you search the archive, you should be aware that four years ago …”
• “The trick is to use the Notes field to hold the ticket numbers, that’s how we track how many …”
• “Maybe not the place to hold a meeting that time of year because …”
• “Peter had a workaround for that glitch …”

Then think of the expense (time and money) and risk (reputation and customer loyalty) inherent in employees fending for themselves, discovering only after months of experimentation that “Peter had a workaround for that glitch.”

5.8 But the locals know!

On a road trip, it struck me how often the local maps’ road number designations did not correlate with physical road signs. Chalking it up to budgetary constraints hindering the placing of signs, I pondered the phenomenon I call “but the locals know!” That phenomenon may cost enterprises dearly.

The map shows we need to get north onto route 37, transferring in the town of Elmin. We get to Elmin’s major lighted intersection—but no route signs are there. Ah—a police car happens by and we roll down windows to hear that “route 37, that would be Elmin Shore Road, back 2 blocks to your left.” We make the left turn, and 300 feet down, indeed a sign says “route 37.”

Later that day, we come to an intersection expecting road number signs. None to be seen—but, by recognizing their shape, I espied the back of such signs kitty corner. Go straight and make a U turn in order to see the road number signs. We believe the locals know perfectly the numbers and names of the roads … but they are not sharing their knowledge with nonlocals through placing signs in a consistent manner.

Translating road sign experience to organizational work raises many questions. As an example: Are there clear “road signs” for new employees coming to work in the organization … or would the recent hires need to rely on asking around to glean local knowledge? Relying on local lore carries a cost—up front or as it happens, for the newcomer or for the organization. What is the greater cost—making up the “signs” (providing adequate documentation) or dealing with the questions, year in and year out? Moreover, what is the cost in terms of the risk inherent in new staff members making errors or poor judgments because of the lack of accurate or updated documentation for policies or work processes?

5.9 Contingency planning: Think through the priorities if things change suddenly

Having dealt with the broken-ankle immediate “next 20 feet of my life” challenges, I have had the opportunity to ponder the matter of coping with and adjusting to changed circumstances longer term. As I learned how to plan for daily activities and
navigate my home (on sports knee pads, the crutches were just too risky), I honed my planning and prioritizing approach: What is the minimum number of knee-steps to get the documents I need from my desk to where my foot is elevated? How about postponing that dental appointment? What items could I assemble on a tray so that I need not leave the chair to get them? Guess what, my friend, that cake I promised to bake … won’t happen!

Information professionals are often faced with the need for such planning. We face secondments, IT revamps, and many other types of new work circumstances—are we ready? How well equipped are we in our jobs to continuing our services in unusual circumstances? What would we do if X, Y, or Z circumstance suddenly changed? What tasks must be done and what tasks can wait temporarily? What temporary measures can we put in place without risking them becoming permanent? How are we planning to deal with the backlogs accumulating from the temporary situation? Let us hope not to encounter much in the way of unanticipated sudden challenge … but let’s be prepared!

5.10 “There’s such a thing?” Nurturing information imagination

A licensed optician arrived for the second time at my doorstep—this time with a finished pair of eyeglasses ready for the final adjustments. The frames were examined the previous week at my dinner table from a selection she had assembled based on a phone conversation and my website photo; the final choice rested on her ability to use examples of my business wardrobe to demonstrate the suitability of certain frame colors.

In accomplishing the transaction effortlessly at home, and in getting frames I would have passed over had I been on my own in the store, I am the beneficiary of information a colleague offered me as I casually mentioned the wear and tear in my current glasses. “There is such a thing as an optician who makes house calls?” was my surprised reaction. Had I thought such practitioners existed, I could easily have looked for one. Not in my imagination, no search.

In the world of information and communication services, such a dynamic is common: if it is not conjured up in thought, it cannot be requested. Knowledge workers are not in a position to look, or ask information professionals to look on their behalf, for materials, tools, and services not even in their dreams. Nor can knowledge workers be expected to imagine and hence inquire about the full sweep of implications arising from our innovative uses and combinations of existing or emerging web services.

Information and communication professionals—taking their own wizardry for granted—may be underestimating that “there’s-such-a-thing?” factor. On the other hand, it is a concern for some that we might overdo the “did you know” outreach; but upon reflection, I believe it is better to verify that our knowledge worker clients know of the opportunities we enable than to make the assumption they know.
We cannot insert visions in the minds of knowledge workers. We can work on building relationships to help them experience how airing concerns, ideas, and plans with us usually results in the discovery of some new advantage they had not imagined.

5.11 As technology evolves … How do we (want to) protect memory?

In my youth, I was a prolific letter writer detailing to family and friends the ins and outs of my studies and work. It was amazing to see the cache of letters my father had collected when I went through his papers upon his passing—every letter from me since the late 60s up until about 1987 was there, constituting “the story as told.” What happened in 1987? Telephone rates from North America to Europe dropped. When it became possible to have leisurely chats because the per-minute cost fell into a manageable range, there was no further reason to sit at the typewriter. It never occurred to me to consider any kind of legacy or history aspect, but I have told friends tongue in cheek how “historians will be at a loss” as to the details of my work after 1987 … until the web search tools pick up a different trail, of course.

Organizations dating from before the web may have a similar experience as they used aging media until the web era. If some evidence of current work in an enterprise is largely contained in, say, documents captured in repositories and featured on its intranet and public website, there are well-known methods to keep them. Beyond legal requirements, what do we want to remember—and what do we want the world to be able to discover about our past? How can we feature the value of what we have kept? How can we trace the evolution of our presence? How can we ensure our legacy materials are there to support future research? How could technology developments affect future access by researchers to our collection?

Information professionals will have plenty of opportunity to help their organizations address such questions.

“Constructive bragging”—A fine art deserving more attention

When information professionals perform “miracles” for their clients, they sometimes modestly refrain from touting the accomplishment. That’s a pity—for the organization in question, for the information professional in question, and for the profession overall. Good news stories—how the investment in the expertise and content in the information center or library helped the organization move toward its goals or address its challenges—deserve to become well known, and it is our job to make that happen. But fear not—we can raise awareness without any “cringe factor.” I know of one information-centric team whose bulletin is eagerly read by constituents because it regularly brings stories about how a specific situation was addressed by the staff or by the tools made available. The “you can, too” value is high, and the factual nature of the stories secures credibility. So let’s not be modest and think “well, it’s all in day’s work” … instead let’s think “how can we tell others about this success in such a way as to add to the overall awareness of what is available from that mysteriously named information professional?”. Go ahead, brag away.
5.12 Oh—Just one more thing (thank you, detective Columbo): Priorities matter!

Professional pride is a powerful driver of on-the-job behavior, appropriately so. That said, I find it’s often helpful to “step back from the brink of perfection” and ask: Are we here to run the most perfectly managed information center in the world, for example, cataloguing every item to the most stringent standards … or to help the clients get their jobs done? The answer is obvious.

As always, it’s not about doing things right (the way we were taught back at library school) … it’s about doing the right things. And the “right things” … are the activities that will make a positive difference to our stakeholders. The choice is one we need to make—and sell—every day.

►►► WHAT DO YOU THINK, FRANK AND PAOLA?

Frank has worked for many years as a business process analyst. Paola is the manager of a small client support unit in the same company. Having already moved on from “the fold,” they are always on the lookout for opportunities to add value to the organization.

Frank: I have come across so many of the situations you describe in my years here at the company. I could regale you with so many anecdotes how opportunities were missed or information got lost—not because anyone failed in his or her job, but simply because the mechanisms were not in place to ensure corporate memory did get protected and the right people found each other.

Paola: Same story here. I’m often in a position to report to IT or Quality Assurance that a pattern of complaints or billing inquiries has developed in the customer calls my team gets—and then it turns out other departments have in different ways heard of those problems. There seems to be a need for a more coordinated approach to responding to, and of course benefiting from, customer input.

You are typical of many professionals who are alert to activity patterns and who think about the business implications. You remind me of someone who is extremely proactive about delivering insights and analysis the business teams never thought to request. He thinks ahead how every service or product can be made to support the business teams even better, and he pushes his staff to think that same way. For him, it’s all about helping the business teams be productive and achieve goals … and funnily enough, he is not terribly worried about his employment security and that of his staff. He has a great deal of support widely in the organization from people who know very well that he is instrumental in their success.

Paola: Funny you should mention that. Earlier in my career, when I was a reference librarian, I was very focused on the research expertise I could offer. It took me a while before I realized the business teams don’t care about my credentials or expertise—they care about how they benefit. So I taught myself to begin every sentence with “your team will gain …” and similar statements focused on “what’s in it for them.” It is so much more powerful to say “the backgrounders your team will receive for each new project will enable you to get a head start” than to say “we can give you expertly researched information.”
Frank: As I’m working with the various business teams, it strikes me how beneficial it would be if our company had a special unit whose sole purpose was to detect and address opportunities to assist the business units work effectively without having to reinvent wheels or discover information when it’s too late.

Paola: Yes, a kind of information and knowledge management squad! Information and knowledge management is challenging in that it’s unlike the kinds of record keeping long entrenched in many departments of regulated entities. In supporting efficiencies where the long arm of the law does not impose rigor, we are challenged because we don’t have a legal or regulatory stick with which to enforce systems or processes. We are in essence—in the absence of that figurative squad you mentioned Paola—left with subtler influencing tools in addressing the challenges arising from employees not knowing what they can ask for, business teams not having comprehensive document repositories, and so on.

Paola: I think you are referring to the fact that information professionals need to schmooze their way into working with the business teams?

Frank: That’s what I believe. I have been successful in building relationships allowing me to put in informal proposals for collegial sharing tools and memory databases, for example. My ace was that I had credibility knowing the business of the teams.

You are getting to something important here—credibility. When we come from the outside, it’s tricky to be making recommendations to business teams. The way I’d suggest going about introducing new tools or services involves the “chopped liver” angle. What you do is build rapport with key people in a team; then you ask if they’d be willing to act as a pilot test group for an information initiative. You then use the pilot group’s input to perfect your service, tool, or initiative—making sure to publish far and wide the names of those who helped. It is beneficial to spread the word about who have worked with us because it lends legitimacy all around. We hope our helpers will speak well of our services whenever colleagues ask “What was that new thing I saw your name attached to on the intranet?”

Then, we use all the input to the hilt. We say “according to the X group’s insightful suggestions, we made some adjustments we think you will like” and similarly indicate that we are merely acting on business teams’ requests.

Frank: I get it—it’s not about us, it’s about the business teams. Everything we propose has to fit within their framework and aspirations.

Paola: That is a message I carry when I speak to the students at the local information faculty. I tell them it does not matter, sadly, how well information professionals perform in or manage a corporate information center if they are not closely aligned with the business teams.

Now you are echoing my “nobody buys research” message. We can’t sell our craft in isolation, but many will value that our research puts them in a position to reach their goals. No one wants a document repository for its own sake, but many will want the ability to avoid errors, embarrassment, or needless work. We need to speak about our work in terms of the outcome it produces for stakeholders.

Paola and Frank: How true. We learned early on that the days of sitting behind a desk, dishing out information, are so over!