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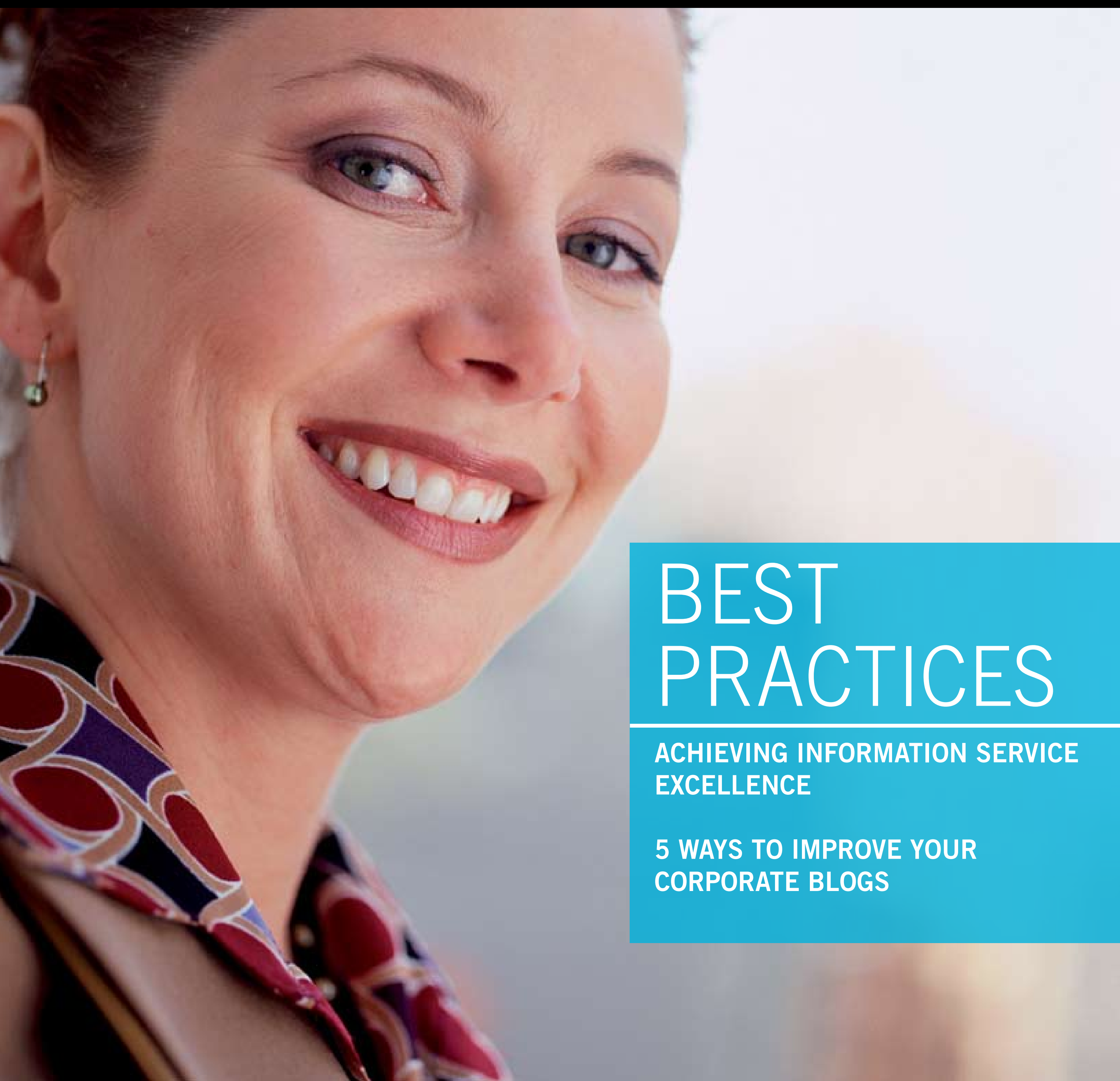

BEST PRACTICES

ACHIEVING INFORMATION SERVICE EXCELLENCE

5 WAYS TO IMPROVE YOUR CORPORATE BLOGS

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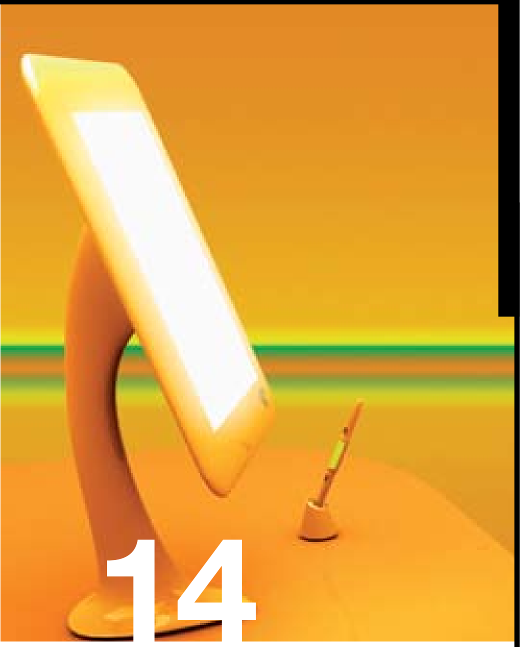

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Achieving Information Service Excellence

MARIAN THE LIBRARIAN HAS HER WORK CUT OUT FOR HER. WITH HER BOSS SCRUTINIZING PURCHASED CONTENT, SHE HAS TO DEVELOP A BEST-PRACTICES PROGRAM FOR HER DEPARTMENT.

BY BETTY JO HIBBERD

It's 6:30 p.m. on Monday and our heroine, Marian Paroo, has just finished a lengthy meeting with her manager. From the look on her face, the news is not good. Once again, the budget of the information center is being scrutinized and this time it's all about the purchase of content—one of her major responsibilities.

Marian's manager wants a new methodology developed and implemented that covers both the decision making and tracking for this task. But, more bothersome to Marian now, is that this methodology is to be based on "best practices" within the industry. And the project needs to be rolled out by the end of the quarter, a mere six weeks away.

Marian has a rising sense of panic because she's not sure just how to go about establishing a best practice. While everyone talks about "best practice," *exactly* what is it? Why should Marian's company adopt a process that may come from what someone else considers "best?" And what about obstacles she may encounter?

The goal of this article is to provide a starting point for our hypothetical Marian (whose name comes from "Marian, the Librarian" in *The Music Man*) and for anyone else who has run into a similar situation.

Definitions, Pitfalls, and Adoptions

While there are many nuances in definitions of best practice, they generally fall into two categories: those that originate in an external organization or those taken from a process that has been successful within your own organization. For our purposes, we will use the definition of a best practice as "a concept referring to the best way of doing something."

Using best practices is ideal for optimum performance, but Marian may encounter some obstacles. Internally, there are potential drawbacks in several areas. First, it is sometimes difficult to make tacit knowledge explicit or to explain exactly what is done in a "step-by-step" fashion to create a best practice. Additionally, the time it takes to research and create a best practice in a resource-shy environment may often seem overwhelming. Another stumbling block can be the identification of critical business knowledge that pinpoints gaps in the current process. Finally, it takes effort to implement and gain acceptance of a best practice within an organization so, frequently, it's much easier to continue with the current "accepted" workflow.

As for external obstacles, the cost of purchasing benchmarking reports or outsourced surveys can strain budgets. And, although there is discussion in the literature about working with colleagues in other organizations to share best practices, Marian may find that a best practice is considered a competitive advantage and so precludes this type of cooperation.

Should Marian take the trouble to adopt best practices only because her manager has requested it, or are there other reasons?

Given the expectation to do more with less and to ever maximize current resources, adopting a best practice

can help improve work processes for delivery of products and services to better meet client needs. That translates into achieving effectiveness, efficiencies, and economies that are extremely important to senior management. It also aids in building stronger relationships across the organization.

Perhaps most important, however, this type of effort, if communicated properly, will help prove the value of the information center, raising the perception of its importance to the organization and helping to gain improved support from upper management.

So, just how does Marian go about creating and implementing a best practice to help her gain control of content purchases, thereby pleasing her manager, making points with the organization and, in general, saving the day?

Five Steps To Operational Excellence

The process of identifying and implementing a best practice can be outlined in five steps:

- Assessing internal needs by looking at the business needs of the organization and how the information center must perform to help meet those needs, including performance objectives.
- Understanding current practices by capturing the current workflow that meets those business needs, and then by identifying the gaps and points of failure in the process.
- Examining alternative practices, whether internal or external, including research into benchmarks for the process and as analysis to identify possible improvements.
- Modeling the best practice by selecting an appropriate solution and then creating a new workflow or process for implementation.
- Implementing the new process, which requires measurement of the new service—and communication of the results to your staff, your customers, and senior management.

Let's look at each of these steps in more detail.

> "In a business environment characterized by new ways of doing business and fiercely competitive marketplaces, workplace libraries are facing major challenges. Key to meeting these is the ability to demonstrate value for money and return on investment through the provision of highest quality service aligned with organizational goals. In this turbulent setting, the ability to share best practice and pool experience is invaluable and provides the workplace information manager with the opportunity not only to learn from others, but also to help establish and strengthen perceptions of the in-house information unit as being among the most effective."
>
> — Caroline Oades, in "Benchmarking Workplace Libraries"

Step 1: Assessing Internal Needs

Before looking at business needs, it's important to clarify who are the customers of the information center. There are three groups: first, senior management or those who have ultimate control over your budget and existence; second, client users, those who use your resources and services, either through onsite visits or via electronic means; and, finally, the information center staff itself. The quality of service found in the information center is directly attributed to the knowledge, experience, and attitude of the staff. How they feel affects their performance and the type of service they deliver. (Gohlke, 1997)

All three of these customer communities are critical to Marian's efforts. These improvements will impress upper management and please her clients. *And* the full support of the staff is necessary to her plans as they must carry out the research and make the resulting improvements.

Identify business needs. Surprisingly, according to Laurie Kauffman, of Net Worth Consulting, Inc., business needs may look like they don't have much to do with information needs. But what could be more important to any business or organization than coming up with new ideas, developing better processes, or improving implementation of those processes, (Kauffman, 2003) the true "activities of business."

Identifying the gap between the status quo and potential business activities will pinpoint the business needs. In reality, this is the point of the activities the information center does for its clients. And it's important to realize that these activities of locating and filling the gaps are what are important to senior management—the first group of Marian's customers. For instance, requests for information coming into the information center—such as queries into the existence and utility of current technologies, market intelligence, and customer and competitor research—may already highlight some areas of business need and, in all likelihood, inform the content purchases that Marian is making.

And for Marian, an important question she might ask at this point is whether there is a regular review of content planning as it relates to stated organizational goals and objectives. Identification of the business needs can inform the type of content she needs to purchase. While she may already have a working list, because of the budgetary constraints to achieve this move to "best practices," a new examination of priorities and key drivers is in order.

It takes effort to implement and gain acceptance of a best practice within an organization so, frequently, it's much easier to continue with the current "accepted" workflow.

Identify performance needs. This part of step one is where Marian must combine the expectations of senior management and those of the information center clients so critical to the success of her project. For senior management, they fall into three categories: how much money you receive and how you spend it; how you save money for the company and how much; and how much time you save your clients that increases productivity. As you can see, this is all about the wise use of resources to help increase the bottom line.

As for clients, typically they expect the information center to offer expert service, and the information or content they need when they need it. Also of interest is how quickly information problems can be solved, and whether they will trade off time for quality—in other words, how well you fill their requests. (Gohlke, 1997)

One of the best ways to determine performance needs is to conduct a needs assessment. This is the process of gaining an understanding of your clients' information use habits, preferences, and perceptions, based on their direct feedback. It is also an opportunity to gain information about non-users as well as those currently served.

This process will give Marian a view of information and how it's used and perceived through the lens of the user. Often, info pros provide information into a narrow window of the work life of the professionals they serve. What other needs are not being met? What services are not valued? Can she eliminate some services to free up resources or improve other services to make them more appreciated? And what standards are acceptable to her customers?

Also, there are usually many non-users in an organization. Needs assessment studies allow information professionals to understand their needs as well. For Marian, this is a way to tap into potential supporters for the information center, which might translate into a budget increase.

Set performance objectives. Now that you've finished your needs assessment, you need to step back and look at what you've discovered or analyze the data. Needs assessment, just like anything else you do, should be placed in context of your overall business. You serve different kinds of users in different business groups and needs vary from group to group. To understand what each group values and communicate the value of your offering more effectively, it's important to look at the information from a needs assessment as a story that the data tells.

Here are some questions to get you started that have been taken from the balanced scorecard approach as explained in an article by Joseph Matthews:

- How do customers see the library? (customer perspective)
- At what must the library excel? (internal perspective)
- Can the library continue to improve and create value? (innovation and learning perspective)
- How does the library look to stakeholders? (financial perspective)

Now, after looking at the broad view, let's dig a little deeper. Take the information and ask yourself specific questions such as:

- What do users value?
  - Has this reshaped your thinking on content selection?
  - Have you discovered additional justifications to support your budget?
- Is there a feedback loop? Does your valuation of services match your clients' views?
- Are we doing things right?
- Are we doing the right things?
- What is the minimum performance users expect?
- The maximum? (Matthews, 2003)

The trick is to link them to a specific product or service provided— and ask what level of performance you need to reach.

Step 2: Understanding Current Practices

Marian may have a procedures manual that outlines the processes used now. However, absent that, she can begin by choosing a single workflow and documenting the steps. This will help her identify gaps and points of failure. The simplest way to do this is to begin with a sequential list of exactly what you do in a single process. Here is a very simple linear list of what might happen when a request for information comes into the center. (The accompanying box shows a graphical workflow view.)

- Receive request for information
- Log request
- Conduct reference interview
- Conduct research
- Write up report
- Deliver to customer
- Follow up for feedback

After identifying the gaps, you would create a more detailed list of the process:

- Receive request for information
- Log request
- Conduct reference interview
- Conduct research
- Review with customer
- Satisfactory or
- Not Satisfactory
  - Clarify additional needs
  - Conduct research
  - Review with customer
  - Satisfactory
- Write up report
  - Include branding
- Deliver to customer
- Follow up for feedback
- Log feedback

Some of the questions Marian might ask during her assessment of customer needs or establishment of performance objectives and then depict in her workflow model are:

- Are there content resources that are purchased yearly as must-have vs. those purchased on an as-needed basis?
- How are "must haves" determined? By customer survey? By tradition?
- Is there a policy governing "as needed" content purchases?
- What is the process for fulfilling these requests?
- Are customers satisfied with current portfolio management process and fulfillment?

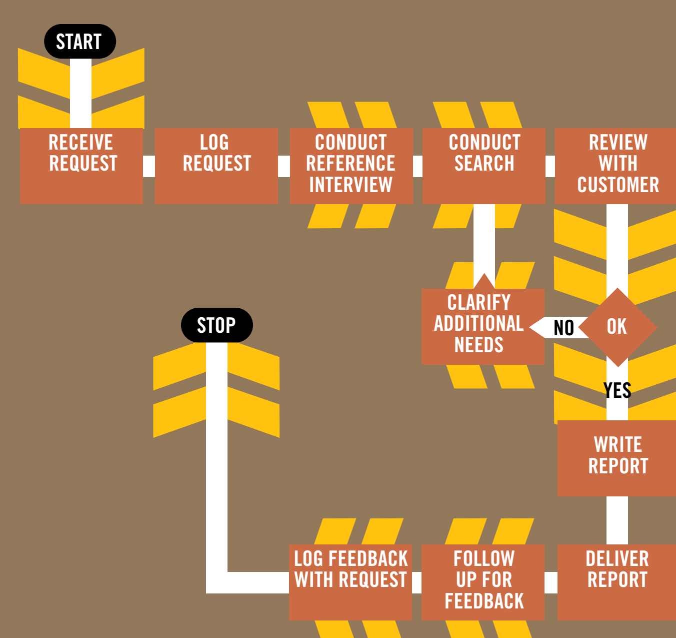
A MAP OF YOUR WORKFLOW

One way of depicting a process is in a flow model. An advantage of showing the workflow this way is that it helps to identify gaps, such as whether the customer is satisfied or if additional research is needed.

There are four figures used in a standard workflow:
Activity= rectangle The rectangle indicates activity: receiving a request, logging a request.
Decision= diamond The diamond is a decision point
Direction= arrow yes/no
Arrows, showing direction, can flow through the process or take you in another direction. They should be marked yes or no at as they leave the diamond.
Start/stop= oval The oval is a start or stop.

A mnemonic aid is ADDS—Activity/Decision/Direction/Start-Stop.

Here is our revised process for handling an information request in workflow format:



Step 3: Examining Alternative Practices

The third step can be very resource-intensive because the research and benchmarking required must either be purchased or conducted by the information center staff, meaning it costs either money or time.

Benchmarking. David Shumaker, in an interview in *Information Outlook* in 2002, defined benchmarking as "comparing your organization with other organizations and learning from the comparison. That can involve process benchmarking, which you can do with an entirely different type of organization from your own, to adopt a process in which their techniques can be applied to a process of your own. Another kind of benchmarking can be done with like organizations to compare service levels, budget, staffing, etc. I would divide it into those two areas." (Poling, 2002)

There are two ways to benchmark. You can bring together staff responsible for a major initiative with others in the organization to share information, ask advice, and discuss the lessons learned. Or you can research and learn from external benchmarks.

As best-practices creation is often a form of knowledge sharing, there can be opportunities for cross-functional interaction and relationship building during a benchmarking effort that can result in future, less structured knowledge sharing. According to Roger Strouse of Outsell, Inc., this informal method of networking or knowledge sharing can be supplemented by secondary information gathered by research means, such as reading articles on other libraries, using SLA resources, or calling comparable libraries, companies, or organizations.

There are, however, more formal methods to gain the requisite knowledge. These may require an outside consultant to put together a study with multiple participants, using surveys, phone interviews and the standard questionnaire. Additionally, you may purchase reports for this purpose. (Polling, 2002)

Competitive research. First, let's look at Marian's conducting her own research. She is probably already providing information to her organization about competitors, industry trends, and market factors. Now she needs to stop and consider for herself the implications of the information she provides, in the context of the information center. When supplying information to her clients, it could be a natural progression for Marian to step back and consider how her organization's competitors are deploying information. What are the processes they use? Would they be adaptable for her purposes? Remember, at this point, she has targeted a specific process, so her research can be quite narrowly focused.

Some other tactics Marian might investigate within her organization are around any formal knowledge-sharing initiatives. She could check whether there are communities of practice that span several departments but revolve around their use of specific content. She could also leverage any initiatives related to her content acquisitions that have been documented—in other words, reuse what has already been achieved by others. Networking to discover best practices is another, less formal, manner of acquiring knowledge of interest.

Before engaging in any more formal methods of identifying best practices within the industry, such as benchmarking reports and external consultants, or even networking with peers in other companies, Marian should make sure she has the support of senior management. These resources definitely will require additional funding.

Potential process improvements. Once the research is completed, analyze the data to identify the best practices for the targeted process. At this point, Marian should have several ideas as to how to improve her current content management process. She should note those possibilities of improvement for use in her revised workflow model.

Step 4: Modeling Best Practices

Modeling the best practice is where decisions are made as to what will work within the organization. This is based not only on the research, but also on the information professional's internal knowledge of the organization and the requirements for implementation.

Select appropriate solutions. To select the best solutions, Marian must assess each one through a financial lens, taking into consideration any increased costs. Remember, she may already have incurred costs in the research phase, so it's important that she under-

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stand that these new improvements may require additional resources.

On the other hand, she can juxtapose those costs against the benefits, as the improved efficiency and effectiveness will save the organization money. Also, based on the needs assessment, the information center clients will now have a greater say in the provision and delivery of information products. This is considered a key element in customer satisfaction.

A side benefit for the information center is that this new aura of ownership creates a partner of clients. This additional support may help with any increased budget necessary to implement these new processes. Finally, there are benefits for the information center staff as well, not just in the better use of their time and efforts, but also in the improvement in morale, the building of even better relationships with their customers, and the introduction of a team approach to problem solving. (Gohlke, 1997)

Step 5: Implementing, Measuring and Communicating

As Marian works through the best-practice process, she should remember she is not only creating excellence for the purchase and tracking of content, she is also improving the position of the information center within the organization.

It's important to make sure that she involves the various groups within the organization. From the top down, Marian needs to find a champion at the senior management level who supports her initiatives. This person should be outside her direct chain of command, if possible. From a bottom-up position, Marian should also involve her clients. She should let *them* identify the knowledge they need and the performance they would like to see. It helps them to take ownership of the new process and support her efforts. Finally, Marian, as the information professional, is in the middle providing the tools, process, education, communication, and facilitation to make this new best practice succeed.

In addition to reward and recognition, the other factor that most quickly changes culture over time is measuring and reporting business results. With a tangible return on investment, the implementation of best practices has clear organizational impact. When the information center is in a leadership role, this also demonstrates its return on investment. Therefore, it's imperative that Marian identify and publicize examples of business results supported by the project, such as improved access to information, reduced project cycle time, and cost savings. She should view this as a marketing opportunity and partner with her organization's corporate communications department.

By taking a visible role in leading this best practice project with visible results, the information center and Marian become associated with the value of the project and it becomes self-evident ROI.

Developing Better Practices

Although we've used the term "best practice" throughout our story of Marian, it is because that is the common terminology. What we really mean is "better practice." Best seems to suggest a "definitive" practice, an ultimate goal. While this is possible in the abstract, frequently you need to adapt your practices to fit your organization. So, should you be tasked with developing a best practice, we urge you to remember Marian's project and think of it as an opportunity.

Some final thoughts on developing better practices: While the process can begin with relatively quantitative activities like benchmarking, it often moves to more qualitative work that is connected to issues such as morale and customer satisfaction. Additionally, by modeling the best possible business practices, the information center becomes credible in supporting others to do the same, while becoming much more visible and valuable through the link forged with administrative and managerial decision makers. Finally, this process requires the information center to take on the most challenging of jobs: researching its own organization and itself. **SLA**

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