

Information Management Consulting

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I was recently having lunch with a colleague and overheard the following conversation at the next table:

1st person: So how's everything with you?

2nd person: Terrible - we're having consultants come in next week

1st person: That's awful I thought everything was going OK.

2nd person: It was.

Many people have a fear and loathing of consultants. Often engaged by senior management, consultants are sometimes imposed upon staff within an organisation without consultation, and the relationship between the client and the consultant is immediately tense because the perception is that consultants are only engaged when there is a problem. That is not always the case.

In this article, I hope to give some insight into the role that a consultant can play in the information industry, and dispel some of the myths about consulting generally. I hope to be able to give you a small insight into some of the issues that I have identified within our profession as an information management consultant over the last few years.

What is a Consultant?

But first, some definitions are in order. A consultant gives advice to clients, and assists in the identification of and/or solutions to client situations. Or as some people will have it, "A consultant is a person who borrows your watch and charges to tell you the time!". Consultants bring their independent professional expertise based on years of experience, education and training to the client's individual situation on a needs basis.

A consultant is different to a contractor, who usually works within strictly defined parameters, who mostly performs process type work and has little involvement in strategic planning. A consultant is also different to an information broker who provides information on demand, conducts research and can maintain watching briefs on specific areas of interest. As with contractors, information brokers do not normally become involved in the strategic planning of an organisation.

What do Consultants Do?

Our primary objective is to help our clients improve their performance by instituting permanent change in their organisations. While improvement may take many forms, such as improving information flows, improving the utilisation of technology, starting a new information centre or reducing costs, commercial clients fundamentally seek higher return on investment and sustainable growth. Our approach toward improved performance typically involves helping clients identify particular problems, and providing innovative, analytically-based solutions. This process involves a series of activities which constitute the essence of our work - and of the value we offer to our clients:

Project Definition. Before beginning a project or any in-depth analyses, we identify our main objectives based on our initial discussions with client senior management: "What questions must be answered? What data is likely to be available?" The chief pitfall is confusion of the brief. Clients usually have a clear idea of what it is that they want to achieve from the project, but often the initial discussions are in very broad terms. It is therefore essential to confirm the issues and expected outcomes at the beginning.

Information Audits. Many organisations, and sometimes their library staff, have little knowledge of the information requirements of their staff. As an independent consultant, it is extremely productive to talk to clients within the organisation and identify precisely what information they need, regardless of whether it is formal or informal, internal or external information.

Data Gathering. We research client operations, products, and markets through many channels. Sources often include client-generated reports. Third-party experts also prove useful, as well as market research firms, trade publications, and government agencies. Very often the data needed is difficult to find, and we must pursue it with both creativity and integrity.

Interviewing. Interviewing is an essential means of gaining perspective on our clients' problems. We spend a great deal of time with all levels of the client (the CEO, partners, managers, line workers), clarifying issues, understanding processes - discovering, in short, how the organisation operates and where they want to be within their market.

Structuring Analysis. To be useful, the data we gather must be structured, analysed and interpreted. The types of analyses vary enormously, from building sophisticated finance and budget models to redesigning a library's space. Quantitative analysis might result in detailed spreadsheets showing how clients perceive their information needs are currently being met, whereas qualitative analysis could illustrate how the information world is changing.

Communicating Results. A large part of our job is to communicate our recommendations in order to bring about change in the client organisation. Such communication takes many forms. In some instances, when the audience is large we will make a formal presentation or when they are less familiar with the details of the analysis, we will assist clients in making such a presentation. The reports used to support such presentations will tell the client audience in the most direct

way possible what they need to know and do. All written supporting documentation must make a clear and compelling presentation of the relevant data and analysis in words, tables or charts

Implementing Recommendations. Finally, we often work with our clients to implement the strategies, plans, and practices we have identified together. Simply telling a librarian to shift from a traditional library service to an electronic research service may not be the best way to bring about change; we might work with them to develop a new business and marketing plan that helps define exactly which services to promote and which to cut. Helping clients to implement our recommendations - actually working with them to change the way they do business - is often the most rewarding part of our work. By working through implementation, we ensure that our clients get the results they need.

What does it take to be a Consultant?

I have some pretty strong ideas about what it takes to be an outstanding consultant. I assume all will have the intellect needed, the energy this work demands, the knowledge, the training and experience in specific areas of information management that we need, the analytical power required, and an adequate presentation of self and ideas. Above all, I assume that consultants will have a high level of character with a large portion of integrity. These are basic things we assume. But what else?

- A real and applied interest in serving others... bringing our clients along with the idea so that it becomes theirs and, therefore, gets accomplished
- An urge to understand and an effort made at understanding what our clients are and what they want
- An ability to apply our talents for consulting towards lasting relationships. A real measure of success in this business is the answer to the question: 'Are you able to build and keep a clientele?'
- An intrinsic ethical streak to do the right thing for the client and the profession at all times

Why Engage a Consultant?

The reasons are endless, and not always negative, as we overheard in that opening conversation at lunch.

Essentially, clients will engage an information management consultant because:

- The Library Manager is strategically minded and wants to ensure that the Library's mission and the firm's goals are aligned, thus allowing the firm to be more competitive and (hopefully) moving the library toward survivability;
- Senior management does not believe that the Library is satisfying the information needs of the organisation (in the most cost effective manner) and seeks an independent review and strategy; or

- The Library Manager and senior management have differing views on the role of the Library and seek an independent "arbitrator"

The type of work that The Information Source has undertaken over the last few years has been a combination of all three above. Sadly, the latter reason listed above for engaging a consultant seems to be more common, and whilst the ultimate score as to who was right is about 50:50, it is of professional concern that senior management still will not recognise the professional expertise of the Library staff in the first place.

Whilst confidentiality clearly prevents any discussion of individual consultancies, it is helpful to have some understanding of the nature of work undertaken by an information management consultant. Generically, the type of projects that The Information Source has undertaken include:

Conduct of information audits, development of information management strategies, recruitment and training of library staff, reengineering of information services, and identification of knowledge management opportunities for private sector professional service firms.

Conduct of information needs analyses for Commonwealth government departments throughout Australian offices. Identification of business opportunities and development of strategic business plans for information services. Preparation of job descriptions and staff selection.

Reviews of Commonwealth Government information services. Identification of alternate service delivery options, such as outsourcing, and preparation of funding and staffing models.

Identification of information needs for Commonwealth Government organisation and review of library services, staff and collections.

Reviews of several commercial law firms information requirements and library services, focussing on development of internal information and implementation of electronic services. Review of existing information sources and re-engineering of library services and space.

Review of information requirements for a large commercial barristers chambers. Formulation and development of "whole of Chambers" strategies for introduction of integrated office network and networked information resources.

Conduct of feasibility assessment for establishing a commercial information service for multi-national commercial organisation, involving review of all internal functions, legal issues, conduct of external market research and development of business plan and budgets.

Library staff team development and facilitation of strategic planning sessions for public and private sector.

Lessons Learned

Throughout our consultancies, we continue to find libraries being under utilised and librarians not being fully appreciated.

Time and time again I hear staff within an organisation complaining that their information needs are not being sufficiently met, or alternatively, that they are inundated with information and need a professional to help them filter it.

From the librarians' perspective, I continue to hear how so many still have to provide a top quality service with diminishing resources. Simplistically, much of the problem stems from the fact that librarians are not good at asking their clients what it is they need, and if they do, they are not good at listening to what is being said. Invariably, librarians continue to provide services to their clients even if those clients don't really want them, whilst at the same time trying to introduce new services and products with the same amount of resources. No wonder everyone is stressed!

The other major lesson that continues to confront me as an information management consultant is many librarians still have difficulty realising that they must align the goals of their library precisely with that of their organisation to stay in business. Those who do place themselves in a position of indispensability, and I have even worked with a few organisations who have so realised the value of their library after a review that they have talked of taking out "key-man insurance" on their librarian

The final big lesson we are learning is that librarians in professional service firms must become involved in the knowledge management push as soon as possible. There is a very real danger that our profession will diminish in status as the real information and knowledge that has competitive advantage to a firm is managed by people outside the library

Is Consulting Worth It?

Absolutely! One of the great pleasures and challenges of information management consulting is the endless variety of client issues you face - and steps you must take to help find and implement the best solutions. No two situations are the same and no two solutions are the same. There are now so many organisations who are starting to realise that information is valuable and that they can derive a tangible financial and competitive advantage if they manage those resources effectively

It is so important to have someone to call in for strategic assistance when you don't have the time, energy or sometimes any more ideas. I have worked very closely with many librarians who "had the consultants in" and I am pleased to say that all of the results have been positive for both the client and the library

Information management consulting has given me a depth of insight that I don't believe I ever fully had as a librarian in a law firm. It's impossible to achieve that depth until you are exposed to many different situations, environments and people. I have personally never felt so vital and alive, and for possibly the first time, truly understand the issues that our profession and our employers face in today's rapidly changing world. The additional training has been tough, the endless proposal writing time consuming, the financial rewards questionable and the hours horrendous, but worth it nevertheless! The support from the profession has been wonderful and I can thoroughly recommend consulting as a career option provided you don't run your own business!