

Closing the Gap: the Five Essential Attributes of the Modern Information Professional

Abstract: This paper is based on a research study commissioned by the Financial Times and the Special Libraries Association (SLA) to explore the evolving value of information management to organisations around the world. Drawing on responses from both full-time information professionals and corporate executives, the research highlights the challenges facing both audiences and reveals a fundamental shift in the model of information management. The paper aims to provide an actionable framework for the continuing success of the information function in any organisation, describing the five essential attributes for modern information professionals. The research was presented by Simon Lord at the BIALL Annual Conference, 2014 and is published in full at: www.ft.com/sla
Keywords: information professionals; information management

INTRODUCTION

Read the website of any law firm today and it will talk about “client focus” and the importance of a close connection with customers. And for good reason: many successful companies start with an external market orientation and use ‘outside-in’ thinking to guide their strategies and service.

An outside-in approach can equally be applied to job functions, in this case between information professionals and their internal customers, business executives. This concept prompted the Financial Times and SLA to commission a research study: how the FT, with its audience of senior executives, could provide insight into what they want from information professionals, and combine this with feedback from the SLA membership.

The research contrasts responses from both full-time information professionals and corporate executives in organisations that have dedicated information departments. Overall we surveyed 882 people, 83% of whom were information professionals. The fieldwork was carried out in April and May 2013, drawing on both FT and SLA panels, and included in-depth interviews with information providers and users. Participants were drawn from a wide range of professions, including public organisations, with the highest response from the legal sector at 17%. Whilst the majority were based in North America, the study gathered responses from four continents.

The research explores how the world of the information professional is changing. Our survey data reveals how executives who use information feel about the knowledge providers who supply it. We pull out the most important challenges and performance statistics

recorded in the study to lay out a successful path forward for the information function in any organisation. Finally, we outline the five essential attributes needed by modern information professionals.

A PROFESSION IN TRANSFORMATION

Information management is at a crossroads. It is one of the oldest organisational disciplines, yet also one that has been completely reborn in the digital revolution. In an era of big data and the knowledge economy, it remains an essential service, yet organisations are cutting costs and more and more information management professionals are battling to demonstrate their value.

The core skills and capabilities required by information professionals are changing. In the past, this was a discipline that was often hived off from the wider organisation. Today, however, information professionals are expected to communicate constantly with the rest of the organisation, integrate themselves into new areas, build key and productive relationships, and proactively demonstrate their value to senior colleagues.

As well as greater integration with the business, an important aspect is a move from just making information available to ensuring that it is immediately usable. Having a deep understanding of why information is needed, how it will be used and how the business works is now key.

At the same time, they must retain their core technical capabilities, which remain indispensable across many disciplines. The result is a need for information

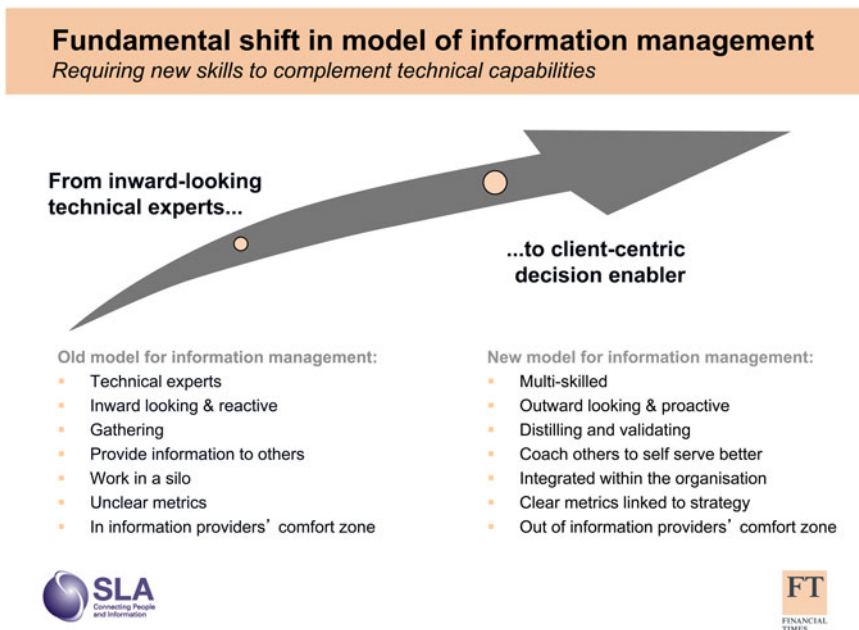


Figure 1: The shift in the model of information management.

professionals to possess a much broader set of skills and a trend for the profession to attract recruits from ever more diverse backgrounds. The new model for information management is outlined above.

TOP CHALLENGES

The research uncovers a clear and revealing contrast between the challenges identified by those who manage and provide information ('providers') and those

executives who employ information provided by knowledge centres in their organisation ('users').

The users describe a frustrating situation of information overload. They spend valuable time having to filter through information provided while frequently questioning the relevance of what they find. They also need information to be more up to date and provided more quickly.

To combat information overload however, both users and especially providers must wield a deeper understanding of organisation-wide strategy and business values.

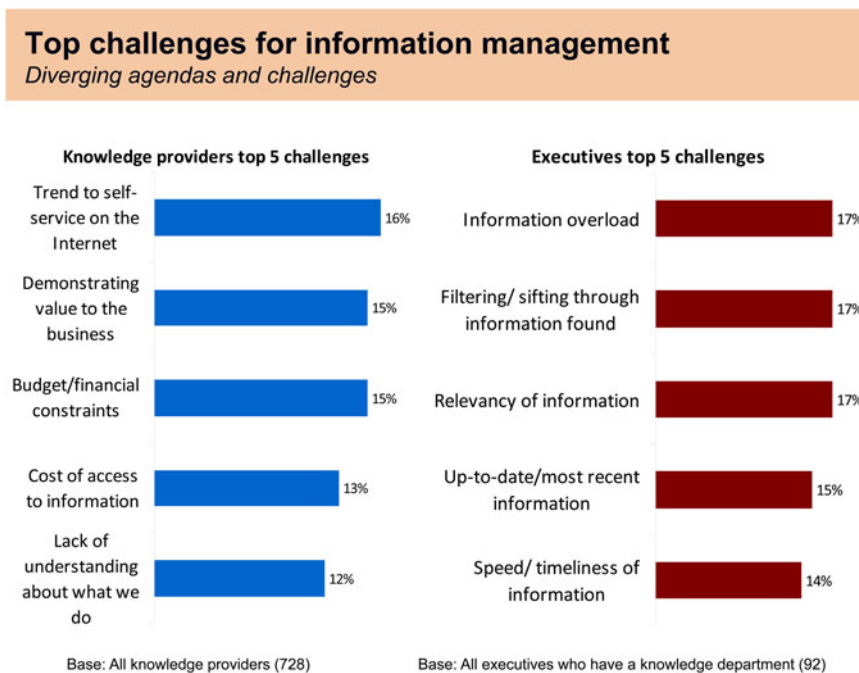


Figure 2: Top 5 Challenges for information management.

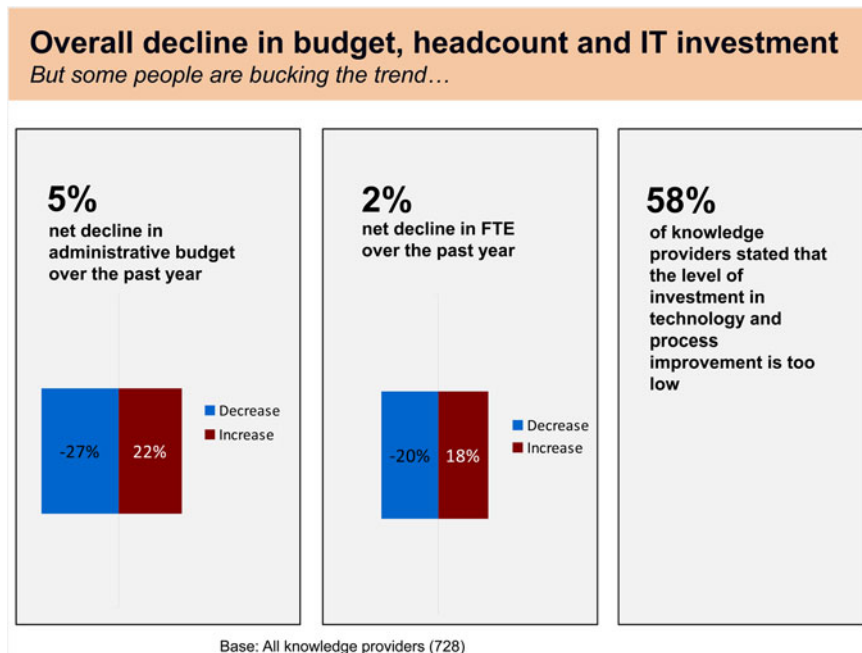


Figure 3: Overall decline in budget, headcount and IT investment.

The information providers tell quite a different story. They are hampered by constraints on their budgets and have to absorb greater costs. Many also feel that other departments and colleagues have a poor understanding of the work they do and that it is a major challenge for them to demonstrate the value they offer. As one knowledge provider summed it up: “we face a lack of time, a lack of influence and a lack of money.”

The top cited challenge among knowledge providers in the legal sector is that an increasing number of their

colleagues are bypassing them entirely, accessing the information they need directly from online sources. This undermines the role of the knowledge provider, removes them as information gatekeeper and exposes the organisation to the risk of employing weak, outdated or false data.

In response, information professionals need to demonstrate the value of their specialisation – a value that carries weight whether their users are turning directly to them or to a publicly available engine like Google for information discovery. The key action for information

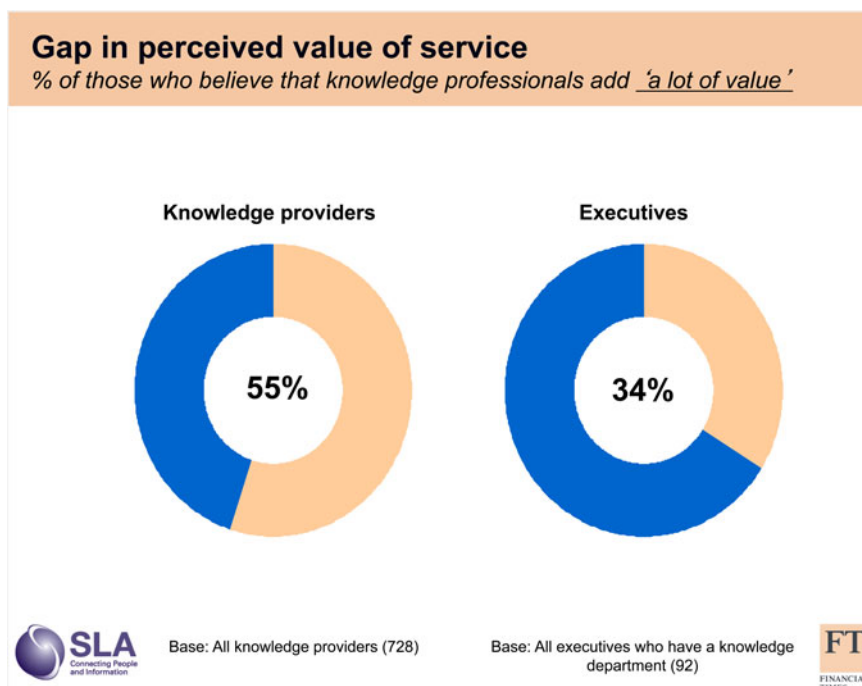


Figure 4: Knowledge providers and executives.

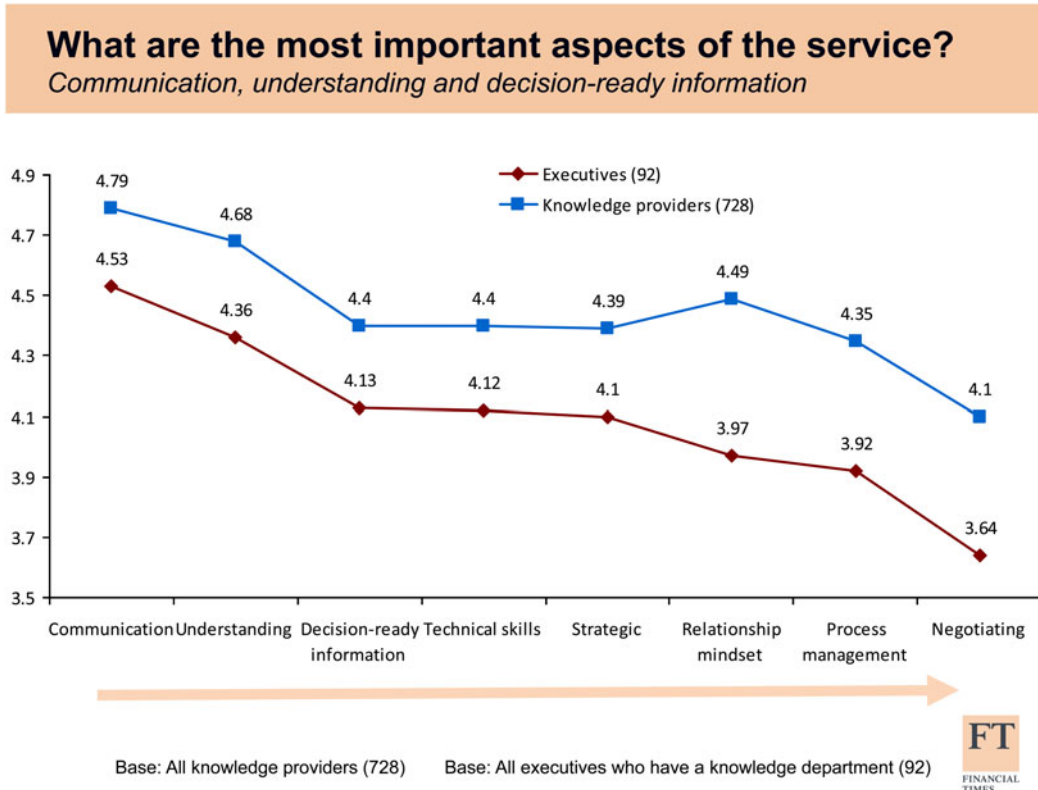


Figure 5: What are the most important aspects of the service?

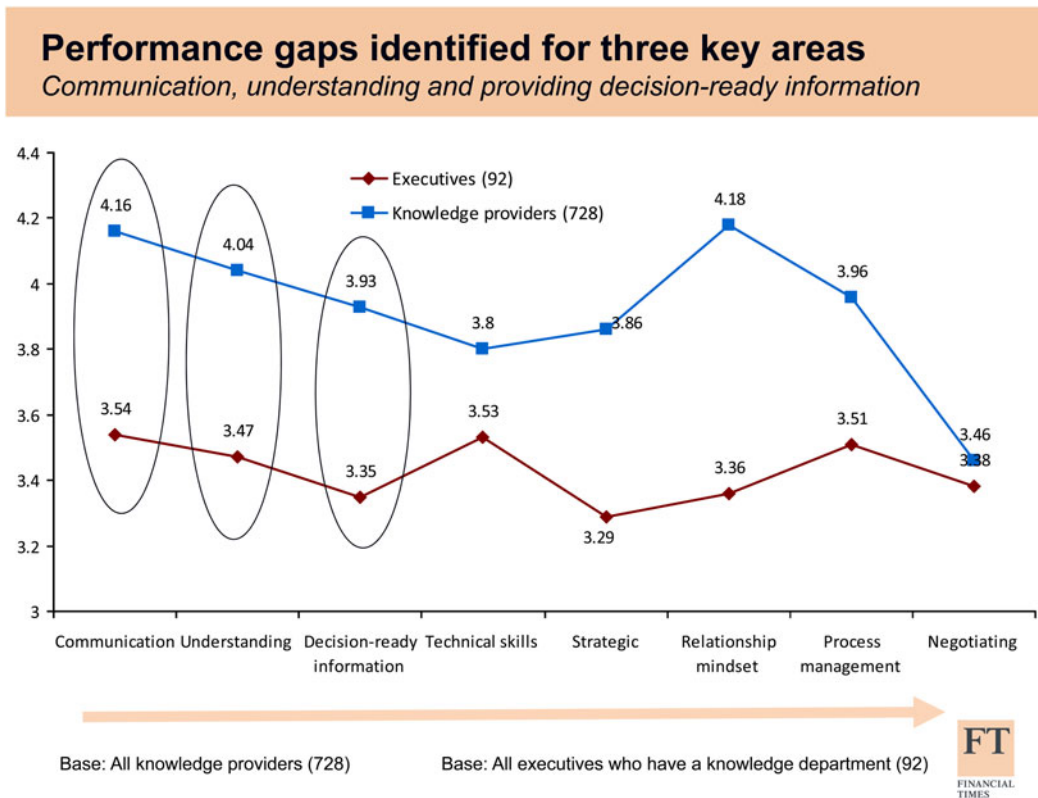


Figure 6: Performance gaps identified for three key areas.

professionals is to get closer to colleagues and prove to them what is possible. “It goes back to a relationship where you can demonstrate to your colleagues that you can find better information, or find something they would never be able to locate on their own,” says Daniel Lee, senior manager for PwC Canada’s knowledge management operations.

BUDGETS

The second major challenge for knowledge providers in the legal sector is a decline in budget, IT investment and headcount. Capital investments in knowledge or information areas are required by the majority of those professionals surveyed, with 58% describing the level of investment in technology and process improvement as too low.

Financial services stands out as the area moving most against the grain on budgets and staff. Respondents from these organisations are enjoying increased budgets (a 5% net increase) and more headcount (a 9% increase).

Perhaps unsurprisingly – with so much austerity in public spending – organisations in education and academia (14% net decrease) and government and politics (43% net decrease) have suffered the greatest budget cuts. These two areas have also been hit by staff reduction, with falls of 4% and 25% respectively, and are calling the loudest for more investment into technology and process improvement.

PERFORMANCE GAPS

So how can information providers become more ‘client centric’ and aligned to the needs of internal stakeholders? One way of conceptualising this is to look at the stark difference in performance assessments between providers and users of information services in organisations today. Engaging productively with internal clients – and adding real value to the business in the process – should be the number one goal of the knowledge management function.

It is therefore concerning that the majority of knowledge providers currently overestimate the level of value they provide.

Overall, 55% of knowledge providers say they add “a lot of value”, yet only 34% of executives are willing to say the same.

This deviation is greatest in the government sector, where knowledge providers believe they “add a lot of value” (50%) at well over three times the rate of their colleagues (14%). In the legal sector, the performance perception gap is also large: some 64% of legal knowledge providers testify to the high value of their services – the highest score among all the sectors – but only 33% of their legal colleagues agree.

A notable exception is in the scientific, technical and engineering sectors, where executives actually rate the performance of knowledge providers nine percentage points higher than the knowledge providers themselves. This could be because these sectors are more

fundamentally dependent on data and have therefore developed knowledge professionals who know exactly how to deliver value to their information users.

DRIVERS

For most sectors, accepting that the performance gaps, as outlined above, exist and need attention is the first step towards a progressive response. The research went a step further to understand the importance of various factors that contribute towards the value of the service. The graph below shows there is clear alignment in the service aspects that both groups feel are important.

Communication, understanding and decision-ready information are rated as the most important aspects impacting the performance of information professionals. They are also – quite strikingly – among the areas with the largest shortfalls in performance ratings between users and providers, as illustrated below. This provides a clear direction and focus for knowledge providers on what to address as a priority.

Communication, understanding and decision-ready information are rated as the most important aspects impacting the performance of information professionals. They are also – quite strikingly – among the areas with the largest shortfalls in performance ratings between users and providers.

There are, however, some key differences. Providers believe they need a relationship mindset, but users do not think this is essential. In a similar way, users want providers to be more ‘strategic’ but providers have not rated this as important. This reflects what we have seen above in the differences between the challenges faced by the two groups.

Knowledge providers know that, if they had better relationships with their users, they could provide a more effective service, so a relationship mindset is therefore something important. Executives know that, to win deals, close pitches and keep clients satisfied, they need a strategy – not a dissertation – so if information professionals thought more strategically it would help them do their job.

More positively, executives appear more ready than ever to engage with information professionals. 49% of executives expect interaction with knowledge providers to increase over the next three years.

ESSENTIAL ATTRIBUTES

The core attributes that follow have been identified across best practice performers in the profession, and as such are instrumental to the information professional’s growth from a more inward-looking technical expert of the past to a more client-centric, decision enabler.

I. Communication

Two of the top five challenges that knowledge providers report in this survey are a difficulty in demonstrating the value

of information services to the business, and a lack of understanding about the information function. Both of these challenges can be addressed through stronger communication.

As many as 61% of executives say that “good internal communication” is “very important” yet only 15% rate the capabilities of knowledge providers as “outstanding.”

Good communication is not just about being clear and articulate. While that is the baseline requirement, truly strong communication is more about long-term engagement with information users. Often, for example, information users are unsure of what question to ask until they have seen the first part of the answer. “You’re often refining your preliminary understanding of the problem and of the solution as you’re going along,” says Clint Evans, director of brand and talent at RPC, a UK legal services business.

This means that information professionals need to view requests from their colleagues as the start of a dialogue, not a transaction request that will be completed in a single pass. Good communication is also about understanding the mindset of your user. It requires information professionals to align with the timing, delivery methods and language of their stakeholders.

Information professionals also need to become more integrated into the business. If many departments do not understand what information services do (or could do) it is not their fault. Information professionals need to take responsibility for communicating with the wider organisation. They should be networking, staying on the pulse of the business and seeking out new opportunities to make a contribution. Information managers at PwC, a major accountancy firm, literally walk the floor of the business in an effort to get to know their stakeholders.

Demonstrating the value of information services is one of the most critical communication challenges. Sometimes, the answer is to make the value of the information professional more quantifiable and linked to the activity of the business. In some contexts, the quantifiable value of information management is linked to winning new business – through successful deals and pitches supported by information professionals. In other contexts, strong information reduces risk.

“The extent to which information services and libraries contribute to business decision-making and mitigate risk should be key benchmarks,” says an information professional at a large financial institution. Linking to profit increases and risk mitigation can be important but, in many instances, even the most proactive and talented information professionals can see their value go unnoticed. To truly demonstrate value, information professionals need to get close to the business and forge strong relationships with users, effectively creating a continuous forum of communication.

Top actionable methods to communicate your value:

1. Network – walk the corridors, attend other team meetings / away days, and attend socials.
2. Map out all the teams in your organisation and identify those you can help (and those you can’t).

3. Show how your skills add value – support with testimonials and demonstrations of ROI.
4. Be proactive with ideas.

2. Understanding

Understanding the business is an important priority for both providers and users of information. Sometimes the only way to do this is to have a background in another part of the business. RPC’s Mr Evans explains that, in the legal sector, “it’s hard to be a successful knowledge professional unless you’ve done some fee earning work. It’s difficult to get, not only an understanding of what the business is all about, but also the psyche of the clients and the psyche of the professionals.”

Information professionals should have a deep understanding of why a certain individual wants information, be aware of why it is needed, and know how to best capture and deliver it. By doing this, information professionals move from simply passing on data to providing insights that can immediately drive actions.

Beyond understanding the business, information professionals are increasingly involving themselves directly within core teams. “The classic view of a knowledge manager is that they have insufficient knowledge on issues concerning clients and they are therefore not in the ball game,” explains Keith Tracey, managing director at Aon Risk Solutions. “There are efforts to change that.”

Becoming more embedded does require buy-in from all sides – management, information leaders and the executives who need to welcome information specialists into their processes. It also requires a different way of thinking.

Effectively embedded information professionals do not think ‘in transactions’ like their librarian predecessors. “It’s more about opportunities for adding value on the life cycle,” says Mr Lee. “In our business, that would be a professional services engagement. So there’s a lot of value we can deliver before that engagement even goes to proposal stage. If the work is won, there’s a lot of intelligence that can be provided, then during the engagement and at the end of the engagement there are a lot of points we can provide value. That really goes back to this notion of getting yourself embedded in the process of the business.”

Top tips to understand the drivers:

1. Understand your organisation’s overall strategy and how your department can contribute.
2. Clarify the objectives and why information is required on each assignment.
3. Capture user preferences – resources and how information is delivered.

3. Process

Today’s information professionals need to do more work, deliver it faster and get by on leaner budgets and smaller teams. They also exist in new contexts, where

professionals manage a mix of internally captured data, internally researched data and external information services. Many also manage external professionals who contribute to the team under an outsourcing arrangement.

The only way to manage the complexity and the workload is to make greater use of project management techniques and technology to achieve greater productivity. Process management is not something information providers currently do well.

In our survey, only 13% of executives rated the performance of knowledge professionals on process management as “outstanding.” So, what are some of the things information professionals can do to improve this part of their skill-set?

The obvious actions might be to participate in training on relevant technology and project management training. Another could be to make better use of checklists and templates while ensuring that clients understand timeframes and processes. In the longer term however, information managers should be looking for deeper transformations: initiatives that reduce the burden of stretched resources, instead of simply providing coping mechanisms. Three of the transformations with the most potential are:

- Access points and self-service. Particularly in environments with high volumes of information requests, knowledge providers should move towards a self-service model.
- Collation of existing data. The next point comes down to one of the oldest skills of the information manager: collation. Pulling data together in ways that make it usable.
- Beware of the black hole. Knowledge providers need to improve the way in which they measure the effectiveness of their service. A crude metric is simply whether users come back for more assistance in future, but what is really needed is a constant feedback loop that enables information providers to streamline their offering.

Top tips for managing the process:

1. Participate in project management training.
2. Create project checklists and templates
3. Clarify and manage expectation – timeframe, quality, volume etc.
4. Use technology to speed process – tablets, mobile devices.
5. Encourage self service.

4. Technical Skills

In this survey, only 14% of executives we spoke to rated the performance on “technical skills” of knowledge providers as “outstanding.” There are likely to be many reasons for this poor perception. Part of it might be the bewildering expansion of technologies used in the creation, monitoring, management and dissemination of information.

As an information professional from a large financial institution points out, “one of the challenges with new enterprise technology is that it requires a lot of training because there is so much data.” There is also a lot of development work being done around big data solutions and cloud-based services, which makes it difficult for organisations to keep pace.

It could also be the case that, with so much emphasis now on attributes like communication and understanding, information professionals might neglect their technical skills. Some have never had these technical skills in the first place, since they have a background from outside of information management.

In an era when database management seems secondary to relationship management, information professionals should take heart from the fact their core day to day skills have not changed. What is different are the tools involved: “The environment has changed in terms of what you’re organising,” says Mr Lee. “I organise pieces of electronic content now, I don’t organise a shelf of books. It’s the same thing – it’s just I’m applying it to a different area.”

Like Mr Lee, many information professionals have embraced their ubiquitous digital environment. The best are experts in – and early adopters of – new technology solutions and tools. They establish themselves as centres of excellence within the business, available to help executives and other departments get the most out of new and existing systems. Many information professionals are already masters of technology and use their expertise not only to demonstrate their value to the organisation, but also to influence key technology investment decisions. Any knowledge management function that falls behind the technological times risks losing control of these key decisions.

Top tips to apply your technical skills:

1. Maintain the high quality and robustness of information.
2. Ensure that information is delivered in a timely manner.
3. Keep up with latest sources. Don’t let your clients get ahead of you.
4. Integrate technology with the information you provide – update internal databases, greater use of mobile technology, and so on.

5. Decision ready information

The top three information related challenges for executives concern the “relevancy of information,” “having to sift through information” and “information overload.” The common thread through all of these is that the information they receive is not ‘decision ready’.

In other words, executives have to spend valuable time trying to get the cup they need from the flood provided. Information providers need to understand that a big part of the value they provide is in turning the deluge of data into succinct, high-quality, current, on-message information.

“Stop providing the world to people,” says Jan Combopiano, Vice President & Chief Knowledge Officer at Catalyst, “provide them a path instead. You can’t cover every base. Use your judgement and point them in the right direction.” According to her, many information professionals try to show their value by being as exhaustive and comprehensive as possible. “If it’s unclear they’re going to give them the lot to make sure they’re covering every possibility. I don’t think people realise that’s undermining their case.”

Only 8% of executives rate the performance of knowledge providers at providing decision-ready information as “outstanding” – one of the very lowest scores that came through the survey in this category.

This does not surprise one information professional who we interviewed for this research. She argues that “it is actually the hardest thing to do properly” for information providers. While it is challenging, the first step is to avoid the old habit of quarantining knowledge management as a function that passively provides information.

Information providers have traditionally kept themselves out of decisions. In some cases, this is just quicker and easier. It is simpler to forward 200 pages of data than to read, interpret and summarise it. In other cases, a lack of confidence is at play.

Some would simply argue that it is not their role to comment on information they provide. Historically there was no problem with that view, but information providers increasingly need to offer more to demonstrate their value. This means presenting information in a way that provides an additional layer of caveats and implications.

Executives never have enough time. Information professionals – who should be the solution to information overload – should recognise this and try to save executives time wherever possible. Much of this comes down to structure, as one knowledge provider explains: “My boss once said to me, ‘take your concluding sentence, and move it to the top’ – for anybody in the C-suite, that is what they want to know. You can then supply the evidence below but they want those first two bullets, that first paragraph.”

Executives also like information presented in a visually intuitive way – using charts, infographics and tables – rather than pages of text. Creating these is sometimes a challenge for information centres, but this creates an excellent opportunity for successful collaboration with other departments within your organisation.

Top tips to provide decision-ready information:

1. Iterate the process of providing information – check and confirm early on, evolve etc.

2. Link information to overall objectives.
3. Structure the information logically
4. Brevity as opposed to data dumps.
5. Use visuals, infographics and word clouds.

CONCLUSION

Information management professionals should take comfort in the fact that they face many of the same challenges as other professions. Those in human resources, tax, finance and legal, for instance, are all striving to become less siloed, closer to core business functions and able to show strategic value to the business. In the same way, information professionals need to justify their value and become proactively involved in the most effective way possible.

Information professionals face a more challenging environment characterised by:

- Changing landscapes – a new era of smarter technology, big data and a knowledge economy;
- A perception gap – where many knowledge providers currently overestimate the level of value they provide in this new world; and
- Austerity – some information functions risk being downsized due to an environment of declining budgets, IT investment and headcount.

This environment demands an urgent response from information professionals that clearly demonstrates their value to organisations.

They must make a fundamental shift from being isolated, technical experts to being multi-skilled team members who enable decisions and proactively integrate themselves into the organisation. Failing to do this will leave information management as a secondary part of the organisation – not part of the “real work” in the eyes of executives. Many of the more specific lessons from the research are linked to simply building trust internally and striving to use best practices.

Rather than perceive these changes as a threat to the profession, information professionals should be willing to adapt and recognise that, with the right response, these changing forces can become an opportunity to evolve and enhance their roles – from gatherer and supplier to analyst, educator and indispensable guide.

A checklist of tasks to help information professionals increase the value to their organisations can be found at www.ft.com/sla

Biography

Simon Lord is responsible for business-to-business marketing at the Financial Times, licensing the FT’s business information to organisations around the world in the enterprise, media and academic markets. Simon has worked in senior marketing roles for major technology companies, including IBM and Misys, and for a variety of marketing agencies. He has a degree in Biology from Oxford University and a diploma from the Chartered Institute of Marketing.