Embedded Legal Information Professionals: Challenges and Opportunities

Abstract: 'Embedded librarianship' has been on the rise in the legal sector since the early 2000s, but what is it and why has it become so popular? This article, written by Peter Wilson and Cosmo Anderson, aims to open up the wider conversations around embedded librarianship through a combination of the authors' practical experience and original research of librarians in UK and Irish law firms.
Keywords: law firms; law librarianship; embedded librarians

INTRODUCTION

Following its origins in the medical sector in the early 2000s, there has been a surge of interest in embedded librarianship from law firms. The AALL has published on embedded librarianship in US law firms (Roccio, 2012; Alexander and Jefferson, 2013), with the 2014 American Lawyer survey reporting that 81% of responding law firms were embedding librarians in their practice groups, up from 14% in 2012 (quoted in Shumaker, 2014). There is little comparable literature available on the application of embedded librarianship within UK and Irish law firms (Andrews, 2014), and the concept is generally discussed in its narrower sense of co-locating information professionals with lawyers. This article aims to open up the wider conversations around embedded librarianship through a combination of the authors' practical experience and original research of librarians in UK and Irish law firms.

Much of the discourse on embedded librarianship within the UK originates from the Special Libraries Association (SLA), of which many law firm librarians are members. In the last couple of years, several members of the European Chapter of the SLA have presented on embedded librarianship, including a media librarian, medical librarian and corporate librarian. The SLA also has an Embedded Librarian Caucus led by David Shumaker, who has laid much of the theoretical framework (Shumaker, 2012). According to Shumaker, embedded librarianship is a way of moving librarians out of libraries: by developing relationships with user groups, librarians can start to develop a better understanding of their users' work and objectives, and might eventually become a "trusted partner" – someone so engaged with the group they are able to function as a group member. Shumaker identifies four key themes associated with successfully embedded librarians:

- Communicating and promoting;
- Delivering highly sophisticated, customised, value-added services;
- Evaluating the impact of embedded librarians and communicating with decision makers; and
- Engaging with management.

Shumaker recognises that there is no "one-size-fits-all" solution to embedded librarianship, and has developed a rich framework for law firms to use when thinking about implementing a new form of information service. This article distinguishes itself from Shumaker's work insofar as it aims to pick out the more broadly relevant aspects of embedded librarianship, allowing law firm services of all structures, sizes and budgets to establish a conversation and learn from each other.

CHANGE

Embedded librarianship is a useful framework for making information services more visible, relevant and valuable to their users. It focuses on the transformative power of user engagement to help services realise the value of change. However, the legal sector is in the grips of change whether we choose to engage with it or not.

At the 2015 BIALL Conference, Mayson (2015) provided us with an overview of the emerging opportunities for librarians working in UK and Irish law firms. He charted a steady professionalisation of business and management within the legal sector as firms responded to the "drive for cost-efficiency, market share, and geographical expansion". He also predicted that the role of information professionals would become more important as:

- Business models shift from being based on inputs from qualified lawyers to outputs from the whole firm;
- Non-legal functions require greater knowledge and information support, and provide greater scope for collaboration across business support departments; and
- Lawyers adapt to a more complex and expansive market by investing in flexible skills.

More broadly, Financial Times Corporate and SLA (2013) have charted a significant shift in the expectations Anglo-American business executives have of their librarians. The following table shows the top five most important/valuable service aspects for information providers in 2008 and 2013, and demonstrates the need for librarians to think bigger than their services and engage with their value to the core business:

2008 responses	2013 responses
Making information available to the desktop	Communication
Conducting research on users' behalf	Understanding (the business, the drivers, the usage)
Providing training on search / use of information	Provides decision-ready information
Providing competitive intelligence information	Technical skills
Managing a physical library and print collection	Strategic

The value proposition of legal information services has also shifted significantly in recent years:

- Library budgets have faced increasing scrutiny since the 2008 financial crisis, and in many cases have either shrunk or failed to rise in proportion with subscription resources. Outsourcing services and suppliers continue to make the market for legal information provision more competitive. There is an additional pressure on librarians located in more expensive cities to justify their premium over near- or off-shored alternatives.

- As libraries shift towards desktop-oriented service provision, especially where they are supporting flexible workers or multiple offices, users are becoming less physically accessible. Legal information literacy gaps can act as a barrier to effective information provision.

- The proliferation of information makes it difficult for librarians to deliver comprehensive and objectively useful information, and "just-in-time" planning is becoming an increasingly important part of collection development.

Legal information services must therefore rebalance their value proposition to their organisations. Embedded librarianship is an attractive concept to have in the mix, as it provides a means to adapt to change at the same time as pitching librarians further up the value curve.

EMBEDDED APPROACH

This section explores the mechanics of becoming embedded by engaging with users. By developing relationships with user groups, librarians can start to develop a better understanding of their users' work and objectives, and might eventually become a "trusted partner" – someone so engaged with the group they are able to function as a group member. Regardless of whether it is the ambition of librarians to become a trusted partner to particular user groups, the strategies for getting to this point are highly relevant for making our services more visible, relevant and valuable to users. We have divided these strategies into three categories:

- cultivating your network;

- selling your core technical skills; and

- working to best value.

CULTIVATING YOUR NETWORK

Analysing the knowledge and information needs of our users is a core skill for all librarians. However, the embedded approach provides some insight to the benefits of establishing a deeper engagement: looking beyond knowledge and information needs to the core work and objectives of the users; and cultivating a strong internal and external network as a means of getting things done.

The purpose of engaging with users in this way is to build ongoing, continuous conversations which act as the bedrock for sustained development. These conversations should ideally be two-way, so librarians are not just learning about their users, but demonstrating their value at the same time. This provides for a much richer form of feedback than transaction-based interactions, and can kickstart a virtuous cycle where users are able to see the results of their engagement, and therefore invest more into the process. Significantly, by moving the conversation on from knowledge and information needs to the core work and objectives of the user, librarians develop a direct relationship to the value they can bring to their organisation, rather than relying on users to understand how to get the most out of information professionals.

In planning for these conversations, it can be useful to think of networks as a means of getting things done. To engage with a user group, consider the activities of that user group and who needs to be involved in getting that work done. Within this network, there will be people who are more "central" than others: people who have the most relationships within the network, or are involved in the most activities, or who bring in the most expertise from outside the core network, or who hold the most influence by virtue of the people they are connected to. Likewise, librarians who want to get involved in a network can consider where to invest themselves: as a central actor, or working through an influential champion (e.g. a professional support lawyer), or as the "go to" person for certain activities. In all events, leading into a conversation requires

librarians to think about *who* they should be talking to, as well as *how* they intend to help the user group get its job done. Librarians might lead into the conversation through an established or informal relationship, or from being able to offer a new solution to the group.

In trying to "move librarians out of the library", it is important to have a positive approach to networking. Networking has an unfortunate reputation for being a preserve of the self-serving, or of the experts who have more to contribute, when it is simply a way of bringing people together who are working to a common objective. The connections you make strengthen your ability and that of your network to get things done. One potential pitfall for librarians actively cultivating their network across their organisation can be a sense of isolation from the information profession, so keeping in touch with librarians and professional organisations should be factored highly into any such strategy.

SELLING YOUR CORE TECHNICAL SKILLS

The embedded approach challenges librarians to know their assets and to maximise their "access points" to users. Access points are anything that puts a librarian in front of a user, whether that is personally (e.g. enquiries at a reference desk) or impersonally (e.g. training guides), with the embedded approach recognising that the most valuable access points are in person and away from the physical library.

By shifting the focus away from transactional services to relationship-driven services, librarians are able to build knowledge and systems around their services much more effectively. A central reference desk may already be trying to make the most of its access points by responding to frequently asked questions with targeted user education, or recording interesting enquiries to avoid duplicating work in the future. This process is amplified when maximising the number of access points you have with users, especially by focusing on high value access points (e.g. services provided in person at point of need) and with the same users over time. Each access point provides an opportunity to learn, gather feedback, demonstrate value and advertise services. These should be actively managed for maximum effect, for example by experimenting with your services so you can see what works and what does not.

Over time, this investment will not only improve your services, but also provide you with the appropriate specialist skills and knowledge for working with particular users. These specialisms can enhance your core technical skills, and help you to:

• better understand your clients'/organisation's information needs;

• serve particular user groups to a high standard by providing tailored services;

• understand pressure points for your client; and

• provide decision ready information.

WORKING TO BEST VALUE

If selling your core technical skills is about getting the most value out of what you are doing, then this can be complemented by adapting to your organisation and making sure that you are doing the most valuable things. This means adopting the mindset of providing "best value": avoiding overperformance in low value tasks where there is an opportunity cost and instead putting your skills where they will make the most difference – whether these are considered traditional "librarian" tasks or not. By treating our expertise as a scarce resource, we can move conversations away from bottom-line costs and fixed responsibilities towards a discussion on where the trade-offs should be.

The embedded approach therefore encourages librarians to focus themselves at a deeper level within the organisation by proactively engaging with the core business. This works best if you are able to develop a strong performance measurement framework where inputs can be negotiated and outputs can be valued (preferably monetarily). Likewise, it can be useful to strategically evaluate the role information professionals have to play in the output of your user group (e.g. what problems do you / could you solve, and is your input critical), especially as law firms are becoming increasingly enamoured with process management models such as Lean Six Sigma (Campbell, 2014). The more proactive you can be in defining the value proposition of librarians for your user group, the more trusted you will become in the decision-making process, and the more value you will actually have to offer.

Another approach to engaging with user groups and businesses at a deeper level is to take a position of leadership. At the 2015 BIALL Conference, Allbon (2015) spoke about demonstrating value through innovation – effectively, getting closer to the organisation by being in front. Jane Bradbury's presentation of knowledge management at Slaughter and May provided a case study on how this can be done at a service level, with information professionals seen as an important strategic presence in this core firmwide initiative.

By investing in this value-driven approach, embedded librarians may even develop a role within their organisation that extends beyond their professional skills.

ADAPTING SERVICE STRUCTURE TO SUPPORT AN EMBEDDED APPROACH

The service structure needs to adapt and continuously evolve in order support an embedded approach to legal information services. The extent to which an organisation is best placed to adopt an embedded approach will depend on the results of assessing the readiness of an organisation and information professionals. Shumaker produced a method for this assessment. In summary, the elements of an information professional's readiness to adopt the approach is dependent on:

• Level of professional experience and expertise;

- Specialist skills and knowledge (as discussed above);
- Understanding of the internal politics within the organisation;
- Motivation to form strong working relationships throughout.

These elements have been reiterated by many in the interviews and conversations we have had with information professionals. The skillset required will vary between embedded roles although the high value contributions required from the information professional remains a consistent. This is combined with the pressure of managing the expectations from clients who will often demand expert knowledge of the work that they do. These challenges may be combatted through strong working relationships throughout the organisation and the leverage gained from the reputation of more experienced colleagues. For example, a successful mentoring scheme or temporarily sitting with an experienced colleague are two successful approaches which we have discussed with service managers. An organisations financial investment in a new professional or a professional who is inexperienced in terms of specialist knowledge is often high, but as long as this is matched with an individuals' motivation to build relationships we have seen that many information professionals can adapt successfully to an embedded approach. Ultimately, this only bears any worth if the organisation demonstrates readiness to adapt. The elements of organisational readiness includes:

- Buy-in from important stakeholders;
- Strong relationships between service managers and their client;
- Management culture that encourages autonomy at the middle and lower levels of experience in the service.

In all cases these three factors are necessary for the service to garner enough support from those who could use an embedded librarian. Not everyone in the organisation will need an embedded librarian. Therefore buy-in from, in the case of law firm, department heads and practice partners is vital as they will encourage the involvement of information professionals, which is arguably the best promotion of an information professional.

THE SURVEY: SNAPSHOT OF COMMERCIAL LAW FIRM STRUCTURES

In March 2016, we published a survey entitled 'Embedded Legal Information Professionals' to BIALL List / LinkedIn, we received 106 responses in total. We were keen to hear from all law firm information professionals on an anonymous basis, including those who do not consider themselves to be part of an embedded service. The respondents came from firms of varying size, measured by the number of fee earners working for the firm at which they work and the number of information professionals at the firm (full details below), in summary:

- Over 70% of respondents were working at law firms which employed between 2 and 9 information professionals;
- 16% of respondents were the only information professional at their firm;
- 11% of respondents worked for firms employing over 10 information professionals.

How many UK and Irish based fee-earners work for your firm?	Number of responses
<25	9
25–249*	32
250–499	33
500–999	23
1000+	9
* This field combines all respondents selecting 25–49, 50–149, and 150–249 – this is because one of the fields was temporarily unavailable for respondents to the survey.	

The survey focussed on the structural aspects of commercial law firms which includes how the knowledge/information service that the respondent provides assigns duties to information professionals; the physical location in which they work and how they most commonly communicate with their users.

The survey offered three team structures, defined as follows:

- **Centralised** team of information professionals that collectively provide services to all fee earners;
- **Federated** team of information professionals that are assigned to provide services to specific user groups; and
- **Hybrid** team of information professionals that are assigned to provide some services centrally and some services federally.

Having defined the team structures and knowing a bit more about the respondents let's consider some of the highlights:

- In terms of physical location, 12% are located in a space assigned to a specific user group
- In terms of team structure, 25% operate from a hybrid structure
- In terms of communication, over 45% of respondents indicated that they must communicate with some of their users virtually

215

CENTALISED OR FEDERATED (OR SOMEWHERE IN-BETWEEN)

Shown in the two graphs below, the majority of respondents assign duties from a centralised pool of information professionals (68.93%), only 5.83% of respondents are working as a federated team with the majority most often located from within a central space/library allocated to information professionals (74.4%).

Chart 1

We also see from Chart 1, that over 25% of respondents recognise that they assign duties in a hybrid structure and over 5% of respondents are operating from a federated structure. The embedded approach by it's very nature develops unique relationships with other colleagues and professionals, tailored to each particular service and organisation. This means that it may be free from the restraints of an organisational structure. It may be the case that you are perhaps embedded to a greater extent than when you started reading the paper. The results of the survey, albeit focussed on the structural trends, show us that you are likely to be somewhere along the continuum between providing a traditional service-oriented approach to legal information services and the fully embedded approach (physically located with your client providing tailored services for their information needs). Certainly, in terms of team structure, there is no "one-size-fits-all" solution that is offered by the embedded approach.

Our survey also asked 'are you physically accessible to all your user-group?' Interestingly, 48% of responses to this question said that yes, all users can choose to contact me virtually or face-to-face, while 42% said no, they must correspond with some users virtually. A physical presence in an organisation is sometimes considered to be firmly associated with an embedded approach. But we are sure, for those that are communicating with clients on a virtual basis, they are still able to be relationship driven, entrepreneurial and ultimately provide a specialised approach to legal information services. The embedded information professional is relationship driven, can sell their core technical skills and work to best value. The physical location and the
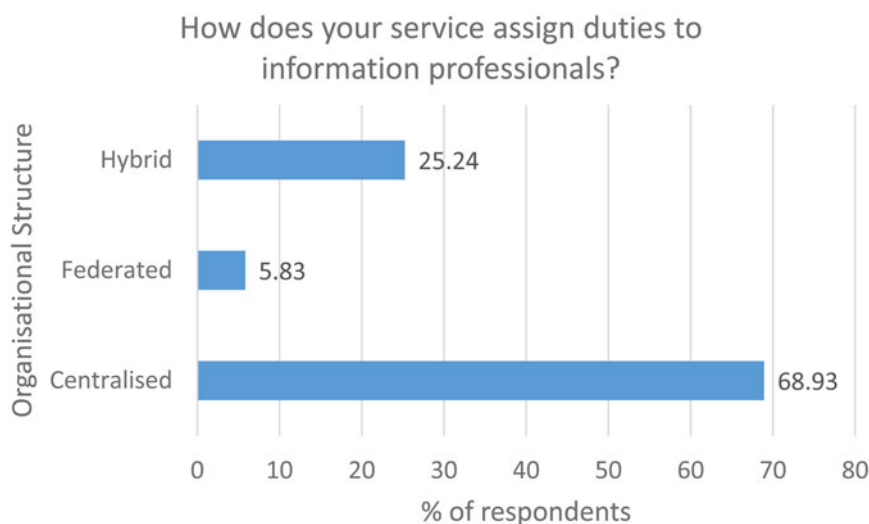

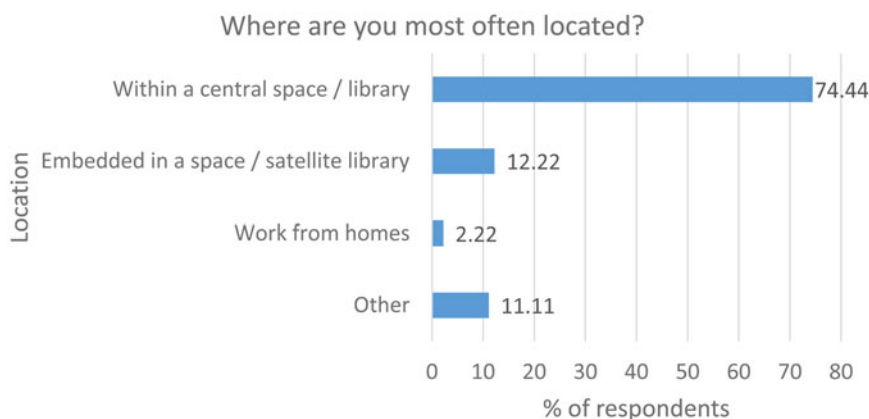*Chart 1: How does service assign duties to information professionals.*

Chart 2: Where are you most often located?

method for further development of these characteristics are less clear. As ever, the working behaviours of information professionals must be tailored on a case by case basis to each organisation in order for the embedded approach to succeed.

After considering the requirements of the embedded approach, such as buy-in from management, and the current structural composition of commercial law firms it is worth stating some of the advantages and disadvantages of the embedded approach. From our discussions with information professionals we have identified the following advantages and disadvantages for the information professional and organisations to consider when implementing the embedded approach to the extent that an information professional is assigned to provide services to specific user groups and is sat physically in the same space as this user group:

Advantages	Disadvantages
Develop significant expertise in a particular	Potential to exist in isolation in your practice area
Practice specific expertise (for example, publishing internal know how to a KM system or responding to specialist enquiries) carried out to a high standard	Less flexibility for general expertise/enquiries covering other practice areas
Information professionals acquire tacit knowledge	Continuity of services in embedded teams is difficult when there is a rapid turnover of staff
Build strong relationships with individual practice stakeholders within a firm	Embedded teams can be more expensive to maintain and "space hungry"
Increased visibility across a firm	Not visible outside practice area

There are no disadvantages which cannot be overcome. It is more helpful to acknowledge that these are challenges which require consideration when implementing the embedded approach and continually review the strategy and plan to avoid them occurring.

CONCLUSION

Embedded librarianship is a powerful new model of working that is becoming increasingly important for law firm librarians. It encourages librarians to adapt to change by engaging with their users and pitching their professional knowledge and skills up the value curve. As the UK's legal industry opens up and the value of traditional information services diminishes, many of the ideas associated with embedded librarianship are becoming increasingly relevant for law firm librarians.

This article focused on three key strategies that services of all structures, sizes and budgets could take forward in various ways:

- "Cultivating your network" by establishing continuous conversations with key users;

- "Selling your core skills" by increasing the value of your interactions with users; and

- "Working to best value" by taking the front foot on conversations of strategy and value.

Each of these strategies can help law firm services to gain more control of their value proposition and find ways of working smarter.

The article also looked at the current appetite for implementing embedded librarianship in UK and Irish law firms. The results from our survey found that the majority of law firm librarians are still highly centralised, with 74% of respondents sitting within a central library and 69% assigning duties on a firmwide basis only. Most services that have adopted some elements of embedded librarianship have done so on a hybrid basis, with 25% of respondents assigning some duties on a firmwide basis and others by user group. Resourcing demands were the most frequently cited barrier to implementing embedded librarianship, but there was near-universal acknowledgement of the positives of the approach, and a strong interest in how the theory could benefit smaller law firm services.

There is plenty more room for considering the embedded approach in UK and Irish law firm services. Case studies from services of various size and structure would help to root the approach in practice, including where implementation has been on a smaller scale. Future benchmarking of law firm services will also be useful to track how our sector is changing over time, and the important role embedded librarianship has to play.

Bibliography

Alexander, A. and Jefferson, J. (2013) "Attitude is Everything: Surveying the perceptions and attitudes of embedded law librarians" in AALL Spectrum. 17(5):21–22, 25.

Allbon, E. (2015) "Infiltrate and conquer: Showing the world what librarians can do" in Legal Information Management. 15 (4):218–224.

Andrews, R. (2014) "The Thick of It - being and embedded librarian in a law firm" in CILIP Update. 2014(March):28.

Campbell, O. (2014) Applying Continuous Improvement to high-end legal services. London: Clifford Chance.

Financial Times Corporate and SLA (2013) The evolving value of information management: And the five essential attributes of the modern information professional. Available at http://www.sla.org/wp-content/uploads/2014/03/FT-SLA-Report.pdf [Accessed 13 December 2016].

Mayson, S. (2015) "Commercial and regulatory evolution of legal services: implications for the information professional" in Legal Information Management. 15(3):150–155.

Riccio, H.M. (2012) "Embedded Librarianship: The Library As a Service, Not a Space" in AALL and ILTA (eds.) (2012) AALL/ILTA White Paper: The New Librarian. Available at http://read.uberflip.com/i/87421/ [Accessed 13 December 2016].

Shumaker, D. (2012) The Embedded Librarian: Innovative Strategies for Taking Knowledge Where It's Needed. Information Today: Medford, New Jersey.

Shumaker, D. (2014) "Law Firm Librarians Moving Quickly to Embedded Model" on The Embedded Librarian: Exploring New, Embedded Roles for Librarians in Organizations of All Types. Available at https://embeddedlibrarian.com/2014/08/01/law-firm-librarians-moving-quickly-to-embedded-model/ [Accessed 13 December 2016].

Biographies

Peter Wilson was the first Knowledge and Information Officer to be embedded in Slaughter and May's Pensions and Employment practice group and is currently a member of BIALL's Professional Development Committee and the Working Group for Professional Skills Benchmarking. He has worked as an information professional since September 2010 and for law firms since February 2013, having also gained some experience in the academic law sector with a brief role at City Law School Library. Peter is currently a senior research librarian at Berwin Leighton Paisner.

Cosmo Anderson has been a member of Slaughter and May's Knowledge & Information Officer team for over five years working in an embedded role with the Corporate and Insurance practice groups, and most recently, the IP/IT practice. Cosmo also works with the Knowledge Management team and is involved in initiatives to improve the processes for knowledge capture and is working to develop relationships with Slaughter and May's Best Friend firms to support and participate in "K&I Networks". He is currently a member of the City Legal Information Group Committee.