

Evaluating and Promoting an In-House Information Team

Abstract: Much has been written and discussed about the outsourcing of library staff. In the following article, Dunstan Speight, Library Manager at Berwin Leighton Paisner LLP, looks at the role of in-house information teams. Although written from the perspective of the manager of a team of researchers in a City law firm, the author hopes that elements of his experience will have a relevance to other sectors and team structures.

Keywords: law firm libraries; library management; outsourcing

INTRODUCTION

For several years, discussions on the future of law firm information services have been dominated by the arguments for and against outsourcing. This is scarcely surprising as, in addition to the outsourcing of individual processes which has been a feature of law firms and law libraries for many years, recent times have seen the wholesale outsourcing of library services. In some firms all support services have been outsourced.

This has been a highly emotive topic and one much debated in conferences and articles. Speakers and audiences appear to be sharply divided into those for and against the process. This is an unfortunate turn of events. Those suspicious of the process, who have watched in dismay as whole departments have been outsourced, run the risk of overlooking the advantage of outsourcing certain processes. By the same token, a rush by management to outsource all business services, rather than looking at the process on a case-by-case basis, runs the risk of casually throwing away something of real value.

The way in which this topic has overshadowed the profession in recent years has not been good for the morale of LIS professionals, who have felt that they have been fighting a rearguard action to preserve their teams and services rather than promoting and developing them. The prolonged economic downturn and the resulting budget cutbacks have only exacerbated this.

Those information services which are currently under review and whose management may already have taken the decision to go down the outsourcing route will probably have little option but to be reactive. For the rest of the profession there is, I believe, a real opportunity to be more proactive in demonstrating the benefits of maintaining an in-house information team to lawyers and senior management.



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TAKING CONTROL OF THE OUTSOURCING PROCESS

Rather than wait for management to spring outsourcing on a department, prudent managers should already be looking critically at their department's work to see whether certain tasks could be performed more efficiently by an outside agency. This is not of course just a question of calculating the cheapest methods of doing work, as issues of quality and timeliness also have to be evaluated. Nonetheless, a

manager should know how much staff time (and, by extension, what staff costs) are spent on the different elements of the department's work. By carrying out an individual review of this, a manager gets a good idea of how the library costs appear to senior management or outside observers. This is good management practice anyway – regardless of the outsourcing issue. Such a review should be planned carefully and not carried out as part of a rushed external review of services.

The results of such a review might lead to the decision to outsource certain tasks where this can deliver better value for the firm and not jeopardise service levels. Alternatively, for some tasks, the outsourcer might be able to offer a more specialised service than is available in-house. Equally, it might lead to the conclusion that an in-house team can deliver services more cheaply or of a higher quality.

Such an analysis is reliant on a sound understanding of the capabilities of the information team. It is the responsibility of the library team and the library manager to understand what distinctive advantages the team possess by virtue of being an integral part of the firm, to ensure that these advantages are fully utilised and to promote the service to the firm.

Look at the distinctive advantages of in-house information staff

It is all too easy to underestimate the advantages of having a good in-house information team and, in particular, the considerable knowledge of the firm and its practice areas which team members develop. Over time, researchers build relationships with many lawyers, as they carry out further research, and should arrive at a very sound understanding of what exactly the lawyers will find useful. This will be particularly true of certain practice areas, such as tax and litigation. Here researchers will build up a specific knowledge base of the practice's work and clients that is difficult to replace if that researcher leaves. This is also likely to be true where researchers work with lawyers who focus on particular industry sectors.

This will not be true of all information staff of course, but high calibre researchers can, and do, develop a very specialised skill-set and a more commercial focus which inform their work. Not everyone may take this as a compliment, but when a lawyer remarks of a researcher, "he thinks like a lawyer" this indicates the right sort of balance. Such a researcher is not acting as a lawyer, but his research is the more valuable for being informed by a detailed understanding of the lawyers' needs.

This insight not only means that enquiries can be answered more quickly and to a higher standard, but it also enables researchers to be proactive in forwarding other information which they come across – both legal and commercial intelligence. Given the breadth of research and current awareness that many researchers carry out, they are in a particularly good position to be able to do this.

The advantages extend beyond research. A really detailed understanding of the work of the lawyers enables the information team to provide a much more relevant suite of resources for the firm. Librarians working closely with the lawyers will develop a very good understanding of what resources (print and online) are most useful and be able to refine their acquisitions strategy accordingly. The combination of an in-depth knowledge of lawyers' needs and the firm's resources helps lawyers work much more efficiently. Even such apparently minor issues as gauging the right number of copies of textbooks or journals has the potential to impede or improve the efficiency of the lawyers. Purchase too few materials and lawyers will end up wasting chargeable time chasing up copies – buy too many and you will be wasting the firm's resources. Getting this balance correct can be a major contribution to the efficiency of the firm.

Nor do the advantages end there. A detailed knowledge of the firm's work also enables resources to be promoted more efficiently to the lawyers – not least via the library catalogue.

Cataloguing seems to have been devalued in many quarters as a professional skill as much by library managers as anyone. Although the addition of the basic bibliographic details to a catalogue is relatively straightforward¹, a good catalogue is so much more than a record of

author, title and publisher details. It should be the key to unlocking the full potential of the firm's resources, by recording content which will be of particular relevance to its users. In many cases this might just be material included in an appendix – a precedent, a code of practice or the text of a convention. Different firms will find different content of interest, so there is a real value in having material catalogued by staff who really know the firm.

Buying in standard catalogue records will either be a second-best solution or involve a significant effort in customising them for the firm. For anyone who doubts the value of good quality in-house cataloguing, a comparison with the efforts that many firms expend in indexing their know how is instructive.

The ability of researchers to draw on a wealth of background knowledge to inform their work has a direct benefit for those lawyers for whom they are working. It should also lead to greater job satisfaction for the researchers, maintaining and increasing their motivation.

Many law firms are currently fortunate in having very experienced information teams in-house, as the fairly static job market of recent years means that many staff will have been with the firm for longer than in a typical job market. These firms should therefore have a great information resource on which to draw.

Library managers with such teams have two key challenges. The first is to continue developing this knowledge and experience, making sure that these are consistent across the team. The second is to promote the team's expertise to the firm.

HOW CAN THIS KNOWLEDGE AND EXPERIENCE BE IMPROVED?

Meetings

In firms where information teams are gathered together in one room, there are plenty of opportunities for colleagues to learn from each other and share experiences. This process can be enhanced by holding regular team meetings where staff report back on key pieces of research and hot topics. Where information teams are split, meetings are essential for a department to build up its corporate knowledge.

There are great benefits to be gained by requiring each member of the team to report back on interesting and complex research they have carried out. Not only does everyone in the team gain from this knowledge-sharing, but it prompts each team member to review the work they have done and to extract the key learning points. Without this, a broader sense of what individuals and the team as a whole is doing can be lost all too easily in the constant flow of research enquiries.

Reporting back at team meetings is also an opportunity to supplement the information that might be recorded on a research database, by communicating more of the background information to both the enquiry and

how it was answered – all of which can help colleagues answer similar enquiries much more efficiently in future.

Locating information team members in practice groups

An information team's ability to appreciate lawyers' information needs and the nature of their work is greatly enhanced when members of the team are based within the practice areas. It provides contact with more lawyers – not just those prepared to make the trip to a central library. The increased contact, both in terms of library enquiries and informal interaction, is hugely beneficial in gaining an in-depth understanding of their work. When this insight is reported back to the wider team via meetings this can be very powerful in giving the whole team a deeper understanding of the firm.

This means that library research can be more relevant, helping the lawyers to be more efficient. It also enables librarians to build up a detailed knowledge of one or two subject areas, which in turn increases the trust placed in them by the lawyers.

The option to have specialist departmental libraries will not be an option for all law firms, but it should be possible to devise solutions to replicate some of the advantages of this. For instance, it might be possible to have a desk in a legal department which could be staffed on a regular basis, so there is at least an occasional, but regular, library presence in a department. Another possibility is to hold library "surgeries" in unstaffed satellite libraries, where librarians could be on hand for refresher training on research or database searching. Library attendance at practice group meetings has the dual benefits of giving researchers a greater insight into the work of a department, whilst increasing the visibility of the library team. (Even the willingness of the library team to be involved in such meetings will often be viewed very positively by departments and demonstrates that the librarians are key to the functioning of the firm and not sequestered in an ivory tower.)

Sharing knowledge with other business support teams

It is important to remember that law firms are not just made up of lawyers and it is worth cultivating other support departments to make sure they have a good understanding of the role and capabilities of the library. For instance, senior staff in marketing and business development may have much better access to senior lawyers and management, particularly over strategic planning. Regular contact with these departments can provide very useful insights and help the library align its work more closely with the firm's developing priorities.

These departments also have a common interest in sources of business and market information. They have much to gain by liaising over database subscriptions and renewals – and sharing their knowledge.

Working out where the information team have particular expertise

Librarians are often seen as the people to ask for information on any subject, a fact readily borne out by any random selection of research enquiries. This ability to respond to such a diversity of enquiries can disguise the fact that the team as a whole will have particular areas of expertise. Typically this will involve aspects of research which lawyers may encounter infrequently, such as EU legal research, US legal research, treaties and international law documents and company databases (especially sources like Bloomberg). It is often easy for researchers with an in-depth knowledge of these areas to forget how intimidating these questions can appear to the non-expert. This specialist technical knowledge, combined with a knowledge of the practice group can prove particularly powerful in providing efficient research.

Building uniform expertise across the team

Having identified where the team can contribute detailed expertise, it is vital to ensure that there will always be researchers on hand with this knowledge, so that the team gives a uniformly high level of service. As mentioned above, meetings are a good opportunity for sharing experience, but this can be improved by a systematic way of monitoring the team's knowledge and skills. A checklist of the knowledge and skills you expect from your team, at the different stages of their career offers a useful basis of assessing this at appraisals and helps identify inconsistencies and plan training.

HOW CAN THE LIBRARY SERVICE BE PROMOTED TO THE FIRM?

Quality of work – the *sine qua non*

While some strategies for promoting a library will work better in some firms than others, ensuring that work is carried out to a high standard across the team is critical in promoting the team. Any areas of weakness can jeopardise the perception of the whole team and this applies to administration as much as to research. The prompt circulation of serials is one area which lawyers particularly notice, but other core professional skills, such as cataloguing, while they are less immediately noticeable, are essential in ensuring the firm extracts maximum value from its print resources. Building up the department's reputation by quality of work is a slow process, but vital in underpinning any other campaigns to promote the service.

Contact with lawyers

Given that the key advantages of an in-house information team are the insights gained by researchers through working closely with the lawyers, it is vital to maximise this

contact. Simply enabling lawyers to put a face to a name is an important element in building up this relationship.

Probably the most important meetings to hold are inductions for new lawyers. It can be tempting to combine training sessions for all lawyers who have joined recently, but investing the additional time to provide one-to-one training for individuals is more effective. By targeting the induction at an individual, you have the opportunity to present a much more informative session and, by having a relatively informal chat, you increase the likelihood of the lawyer providing more of an insight into his or her practice. Individual lawyer inductions are time-consuming, but the effort is well worthwhile. It is also worth offering library inductions to other business service staff, particularly those who will need business or legal information, to ensure that there is a consistent appreciation of library services across the firm.

Attending practice group meetings offers two advantages. In addition to gaining a detailed insight into a department's work, it also offers an excellent opportunity to promote the library service. The very presence of a librarian at a practice group meeting is a good way of reminding lawyers of the service, but it is also an excellent opportunity for librarians to provide an update on sources or service relevant to the department. A short presentation, carefully prepared to be of interest to a practice group, can transform a department's perception of the library service.

PREPARING THE TEAM

Given the level of direct contact with lawyers and the need to increase this, it is vital that every member of the library team acts as an ambassador for the department. Each member of the team contributes to the overall image of the library, so it is crucial to get this right. Developing a team-wide professional image which will impress the lawyers is far more than just a question of appearances and office attire – although making an effort here greatly assists in communicating this message.

The bigger issue, however, is making sure that staff are confident of their abilities and value what they do. This will be communicated to the library users in subtle, but unmistakable ways. For instance, a researcher who sounds hesitant when discussing an enquiry risks losing the confidence of the enquirer, regardless of his knowledge and skills.

Managers need to ensure that library staff value their skills and their contribution to the firm. One method of doing this is to require staff to report back regularly on their key tasks and pieces of research. This helps staff appreciate the range and depth of their work. Reporting back in a team meeting is also good practice for staff to articulate what they do. Lawyers will often ask library staff what is going on in the department. The opportunity to take stock and review what the department is doing should help staff take advantage of such questions by giving a succinct answer summarising some key research or major projects.

Charging back time

When the question of charging for library research is raised most lawyers are only too happy to support this. It is likely that only a small fraction of library research will be directly chargeable to clients, as the majority will be for know how or business development purposes. Nonetheless, charging back even a small amount of research time is a good way of shifting the perception that the library is just an overhead. It demonstrates a business-minded approach to management and should also motivate researchers by demonstrating that their work has a direct impact on the bottom line.

Branding

Many law libraries will offer an array of services such as current awareness updates and company reports. These will benefit from the researchers' experience of the firm and its needs and, in most cases, will score very highly in terms of reliability and timeliness of delivery. In some cases, the researchers will be producing reports or alerts which are so targeted that there is no commercial alternative.

Over time, it is all too easy for such services to be taken for granted. Indeed, many lawyers may well not be aware that the researcher has to do anything other than press a few buttons on the internet. It is worth taking a critical look at such services to see whether the library's involvement is obvious – or even mentioned.

In considering how to brand library reports and updates, it is important to remember that adding the words "Library Current Awareness" or "Library Company Profile" will probably not be enough for all lawyers to notice. Using banner headlines stressing that it is a library service is a good way of ensuring that this key information is not lost in the rest of the text.

Library involvement can also be stressed in other ways – e.g. by adding a note to each update/report reminding the lawyers that this is a bespoke service and that they should contact the researchers if they wish to suggest any changes in sources, coverage, etc.

It is also worth trying to ensure that library branding remains on any documents produced if the work is forwarded to other people within the firm. Saving documents as pdf files is a good way of ensuring that others are not tempted to pass off library research as their own.

Engaging with the end-user of the information

Library research requests often reach the team after being passed down through a chain of people in the firm. From a library PR point of view, it is desirable for as many people as possible in this chain to see the library's research and realise that they carried out the work. It is worth trying to find out if the work is ultimately for the partners or senior management and finding a way to ensure that they know the library was instrumental in carrying out the research.

This can be easier said than done, but the researcher can ask if the research should be sent directly to the partner. Failing this, it is certainly in order to ask the enquirer for more background to the research and then employ more subtle methods to ensure people are aware of the library involvement. For instance, if a piece of the work was for a business pitch, it would certainly be in order to ask the relevant partner whether the pitch was successful and if the information provided by the library was helpful. This might make the partner aware for the first time that the library was the originator of the research. In addition, most lawyers would be impressed by a researcher taking a broader interest in the work of the firm and not just carrying out tasks in isolation.

Opportunities to engage directly with clients

Most of the information team's clients will be within the firm, but occasionally there will be opportunities to engage directly with clients. Many firms now offer additional services to clients, such as training. Information teams can make their contribution to this by offering research training or advice on print or online acquisitions. This might seem a fairly modest service to offer, but this advice is often highly valued by clients with modest library resources. Willingness to participate in initiatives like this is also another opportunity to demonstrate that the team is aligned to the business of the firm.

Taking advantage of excuses to advertise

Each law firm library has a great many opportunities to advertise its services and resources. Indeed there are many everyday tasks which can contain an element of advertising. Regular updates such as lists of new additions to stock or new databases, particularly if targeted to relevant departments or practice groups, are important in making sure the firm is kept up-to-date with its resources. Each update is another opportunity for the library to remind the practice groups of the role they play in the firm. They help to foster the sense that the library is an integral part of the firm.

Researchers and library managers should be on the look-out for more opportunities to advertise. One example is to offer regular training courses, particularly if you can identify topics where you can increase lawyers' efficiency. If you can get your courses accredited for CPD hours, then you will rank even more highly in your lawyers' estimation!

It is also worth reviewing usage of library services and resources to see if they can be marketed to other departments. Lawyers are constantly being told to cross-sell the firm's services so it makes sense for librarians to cross-sell the team's services. An example might be a database purchased for finance lawyers, but which could also be useful for other legal departments and to marketing.

In addition, it is sometimes possible to capitalise on external issues and use these as a way of engaging with lawyers who don't usually use the library. For instance, the library at Berwin Leighton Paisner recently promoted the FT's mobile application to the lawyers. This proved extremely popular with the lawyers and, although all the credit for this product clearly rests solely with the FT, it was an excellent opportunity to promote the concept of the library as the department responsible for managing business research and resources.

It is of course possible to over-advertise – although, I have yet to hear of a law firm library guilty of this. Nonetheless, it is important that each time you contact the lawyers, what you communicate is directed to helping them work more effectively and is not just a meaningless repeat plug for the library.

Conclusion

The development of the library service clearly requires a massive investment of time when many information services have seen staff cuts and a huge increase in workload. Information staff do, however, need to incorporate as much of this as possible within their routine to ensure that law firms do get maximum value from their resources.

Many law firm library teams are providing a very impressive information service. On its own, however, this is not enough. There is a constant need to promote the service, so the lawyers and senior management fully appreciate the resources they have.

Footnote

¹ Although see Holborn, G. Cataloguing: AACR2 and all that, *Legal Information Management*, 10(1), pp. 18–23 for excellent illustrations of the challenges of cataloguing legal materials.

Biography

Dunstan Speight is the Library Manager at the city law firm, Berwin Leighton Paisner LLP. The BLP Library Service recently won the Halsbury's Award for 2011 in the category of Best London Legal Information Service in the Commercial Sector. Dunstan currently serves on the LIM Editorial Board and is also Chair of the City Legal Information Group.