Towards World-Class Knowledge Services:
Emerging Trends in Specialized Research Libraries
Part Two: The Customer Perspective

by Guy St. Clair, Victoria Harriston, and Thomas A. Pellizzi

As a management methodology, Knowledge Services builds on the foundation of knowledge development and knowledge sharing, generally referred to with the acronym KD/KS. It is a framework for management that embodies the highest objectives of knowledge management and combines them with the basic principles of the learning organization and the teaching organization. It builds on the assumption that all stakeholders accept their responsibility to develop, to learn, and to share tacit, explicit, and cultural knowledge within the enterprise. In the knowledge-centric organization, and within its library, information center, knowledge center, or other information services function, KD/KS exists for the benefit of the organizational enterprise with which the library and its stakeholders are affiliated. At the same time, KD/KS is implemented in the organization for the growth and development of these stakeholders as they seek to exploit information management, knowledge management, and strategic (performance-centered) learning for the achievement of the organizational mission.

Knowledge Services, when adopted in the organization, clearly impacts service delivery. As the organization seeks to achieve excellence through the convergence of information management, knowledge management, and strategic (performance-centered) learning, specific benefits accrue:

- Better leverage of resources and capabilities
- Better staff utilization
- Better performance
- Higher quality of deliverables
- Just-in-time, performance-centered learning and training
- Collaboration as the norm (with, as noted earlier, no disincentives for collaboration)
- More customer engagements and interactions, both with internal customers and with the organization's external clients, customers, and stakeholders
- Improved customer/staff satisfaction

The libraries that support the intellectual endeavors of these knowledge-centric organizations – what we refer to as "world-class" specialized research libraries – provide services that might be thought of as "high-level" library services. For such libraries Knowledge Services results in tangible and measurable benefits for their parent organizations, resulting in qualified practitioners who are empowered to implement an overarching information-use "package" that pays off for all enterprise stakeholders. These practitioners then are able to produce the levels of service delivery required for performance excellence, particularly in research management and in the products, services, and consultations that are required for leveraging the research effort for excellence in the end products of that research.

At its most successful, Knowledge Services is about establishing social communities, about creating the social infrastructure, a foundation of trust, and a collaborative environment in which all stakeholders contribute to the successful achievement of the parent organization's mission. It is the ideal tool for enabling specialized research libraries to support the larger organization in achieving its objective. Such an organization might literally commit itself to being "a continuously learning and improving organization," which was the phraseology that one organization openly

put forward as it operational vision. In such an environment, Knowledge Services is obviously about the library's customers, and about providing them with the highest levels of information, knowledge, and learning management. We identified a number of trends in world-class specialized research libraries that demonstrate a serious, organizational commitment to these highest levels of service delivery.

Electronic access. The managers of specialized research libraries all indicate that they have a single library portal for user access. As would be expected, these portals vary considerably, ranging from a simple library webpage as part of the organization's larger intranet to elaborate and very sophisticated portals, in the true sense of the term. One library does not have a "true" portal, as its manager says, but it has a community page with content, and that serves the purpose for the parent institution. At one company, the corporate intranet is simply referred to as "The Brain," since all staff have come to think of it as the first place to go, regardless of their information need. There are a considerable number of obvious links to the library section where the library's own products – newsletters, reports, information about products, reports on competitors, etc. – can be found.

In one organization, all research results (except for books, of course, and hard-copy journals owned by the library) are disseminated on the web, and in another, the library manager describes the library portal as "the biggest intranet site at the company." Staff, including not only researchers but staff in other departments as well (and including departments that traditionally do not access libraries for information) can access everything from sites such as an "Ask a Librarian" link to past research summaries, an expert database, and similar products.

All of the library managers indicate that their customers are very interested in desktop access to information, and no matter how many bibliographic and full-text databases, extensive web pages with links, and the like are provided, their customers are always looking for more. Some of the larger libraries offer an electronic tables-of-contents alerting service, with digital document delivery, and it seems to be a trend in most of these libraries, as one manager says, to "push as much to digital and desktop as possible." The libraries all use various combinations of the standard commercial databases. When asked what's available, it is not unusual for library managers to pull up a list of 50-75+ CD-ROM and database titles, and in one library some 120+ online databases are available. Another library has a content access team whose members include professional staff from the library, from IT, and from the customer base. The team is responsible for working with intranet teams in the organization, to ensure that information customers can access what they need.

Value-Added Services. Such services as knowledge or content management are being undertaken in most of these libraries. Among the managers of these libraries, there is much interest in how the libraries should be offering these services within the Knowledge Services framework, but in many cases development is just beginning. Some of the libraries are heavily involved in discussions about an institution-wide knowledge management program, and several library managers indicate interest in learning about how other libraries are helping their organizations capture institutional knowledge as it is generated through projects and programs. Some pilot projects are being considered, but there is no standard to report among these libraries yet.

One library has begun the actual process of knowledge management for the organization, with the creation of a product called the "Experience Information System." It is an "electronic team room" from which project managers can select project summaries, confidential data about project work, and, as the title indicates, learn from the experience that was gained in other projects. Similar to the "lessons learned" frameworks being utilized in some of the knowledge management initiatives being developed for the military, these "experience databases" exist to provide a resource for others who might be working with similar projects or subjects.

As library managers talk about knowledge management and how their libraries might participate in the organizational effort, it becomes clear that the managers of these research libraries want to participate and use their staff's professional expertise to ensure that content is managed at the highest quality levels. In one library, attempts are being made to capture knowledge at the research level, but this effort is being done project-by-project and department-by-department, and it is not an enterprise-wide effort yet. Another of the libraries was involved in the creation of an intranet knowledge management product (although it wasn't called "KM" as such). This "knowledge bank" became a valuable tool in the organization, and library staff members were heavily involved in creating the thesaurus, which is now used for other KM applications in the larger institution. Because librarians were keenly visible in these KM projects, the connection was made in the larger institution between the library and the information services it supplies, and in the creation of knowledge for the organization, a result that the library's manager credits with raising the library's visibility in the organization.

In another situation, the specialized research library offers a "popular topics" section on the corporate intranet, with succinct knowledge areas where information about particular topics, subjects of interest to researchers, quality standards, concepts and ideas about research activities, and similar notes are posted. The effort includes the launch of a new topic each month, with the upkeep done by the research staff, with guidance and advice from the library team.

Another library has created a system for tracking when the organization is mentioned in book reviews and other scholarly journals, so that management will have a record of how the organization is perceived in the larger world.

With respect to services provided by the libraries themselves, two of the library managers indicated that they keep electronic records of all reference queries but for some reason they are not consulted very often, which raises interesting questions about how the tool and its purpose are understood by staff. Another library manager describes how the library uses a self-created database to track progress of a request, establish or set up a charge code, etc. This library has not set up a reference-type retrieval service yet, but it can be done and probably will be done in the not-too-distant future.

It must be noted, though, that not all of the organizations represented in this study are ready to embrace knowledge management, much less Knowledge Services as a management concept. One library manager commented that, "Sadly, our place is not ready – at all – for KM. The term 'knowledge' does not even show up in the organization. It's all 'information management,' and that at a very rudimentary stage, with stovepipes, silos, a large variety of vendors, tools, equipment, and very little effort at coordination and sharing."

With respect to the concept of experts databases, which are so desired in so many organizations, several libraries have set up informal programs for handling this kind of information. Unfortunately, as is well known, there are problems with keeping the information up-to-date, and if participation is voluntary, there can be what one library manager characterized as "turf and control issues." On the other hand, in some organizations such tools are mandated by senior management, and participants are required to participate, but these are generally not organized and managed through the specialized research library. One such library, though, has had remarkable success with a self-created experts database that includes information of value to all employees in the company. Larry Prusak and Tom Davenport have referred to these experts databases in their book *Working Knowledge*, noting that while the technical side of such locator services has been mastered, organizations are still wrestling with "the issue of how to motivate scientists to include their biographies" and with the "controversial connotations" of the term "expert." In many organizations, those issues are now largely resolved but of course the acceptance of any experts

database tool in the organization depends, as noted, on standards established for keeping information current and for determining whether participation is voluntary or mandatory.

In some specialized research libraries, external commercial services provide the preferred experts database of choice, and the organizations' subscriptions to these products often eliminate the need for the library to move in this direction. These are, however, particular situations in which the experts sought are in a specific field, and the products required have already been commercially developed and are available on the market.

Strategic Learning, Marketing, and Advocacy. All of the libraries are involved, to some extent, in these kinds of activities. It is not uncommon for a specialized research library to have a formal strategic learning program for customers, with a half-time reference (or other) position devoted to managing this function. Even in libraries that do not have a structured program, the library's knowledge workers team with the organization's staff development or training unit to ensure that programs with a library or research focus are available. Computer-based training and learning management systems (usually administered through the parent organization's enterprise-wide staff development program) are often in place or are being considered.

In one library, instead of providing learning and training programs as such, the manager insists that the staff work proactively with customers and potential customers in order to get to know them and to be in a position to "intellectually, intuitively understand what these people need." Learning and training programs are then matched to those established needs.

With respect to strategic learning and training, an important challenge in most of the libraries studied is the need for successful staff in these specialized research libraries to grow, both intellectually and professionally. These library managers are working with very competent, very driven Knowledge Services professionals, and one of the biggest problems they have is keeping the work (and the compensation, of course) at such a level that the employees continue to be stimulated to do their best work. All of the library managers agreed that there are no easy answers for resolving this issue, but that strategic learning as part of Knowledge Services, if carefully thought out and executed, provides a move in a direction that can be very valuable to library staff.

As for marketing the library's services to its identified customer base, one of the libraries studied has had great success in this area, and has taken on a full-time staff member dedicated to managing the library's marketing program. As would be expected, all of the libraries offer such traditional marketing, awareness-raising activities as library tours, orientation programs for new organizational staff, and the like. "Brown-bag" lunches are frequently offered, especially for introducing a new program or service. As with learning and training activities, success is spotty, with most customers taking part only when the topic can be specifically connected to or identified as particularly relevant to the work they do. The lesson learned here is, not surprisingly, that marketing must be tied to relevance. Generally speaking, some form of internal electronic communication is generally used for outreach, for announcing new resources and services, for example, and electronic newsletters are also offered. In all cases, these are considered to be important adjunct library services, and are enthusiastically received by some users, but they are not, as yet, universally appreciated.

With respect to advocacy for the library, the specialized research libraries were asked if they have formal library committees, and if so, whether the committee's role is role advisory, managerial, or has some other function. Only one of the libraries indicated that there is such a committee, an advisory group, with user representation from the various research areas. The same organization also has an "Information Solutions Group" for working with all the units, including the library, that relate to the IT effort in the parent organization. In some other organizations, a task force or planning/advisory committee might be formed to work on a specific library- or research-focused

issue, but the concept of a library committee, as such, does not seem to be of interest in the libraries studied.

A different slant on this concept, though, was found in one of the specialized research libraries. Although all of the libraries have someone at the senior management level who has authority and responsibility for the library and its services (usually through a direct report, or perhaps even a second layer down), informal sponsors at the management level seem to be in place in about half of the libraries. One library does, however, have a formal sponsorship role, with one of the senior management team named to the position. The designation requires that all senior managers "apply," after which one of them is chosen to be the library's sponsor. As it turns out, competition among the senior management group is strong, for each one of them would like to be designated as the library's sponsor (along with enjoying the recognition that goes with such a designation, of course, indicating to those of us in the profession that the "L" word is still attractive to many laypeople!).

Knowledge Services. Formal arrangements for managing information management, knowledge management, and strategic learning as a single function are, as yet, rare in specialized research libraries, although quite a few organizations connect two of the three disciplines. For example, some organizations have knowledge management and staff learning grouped together as part of an operational function already in place, usually in the Human Resources department. Others have linked up information management and knowledge management, connecting the organization's IT products with the KM function. Knowledge Services, *per se*, continues to operate through informal arrangements, and often with learning and training handled by the unit that wants to sponsor a program or is seeking a learning activity. In the library, participation in learning events is usually handled on an *ad hoc* basis, or through the parent organization's staff development office, human resources unit, or whatever other operational function has been designated to handle this work. Several library managers did, however, expressly connect the success of learning and staff development in their libraries – both for library staff and for library customers – with a positive and mutually rewarding relationship in place with the organization's staff development function.

Some libraries are mandated to provide services to all of the organization's employees. In one case, the library retrieves background material to inform corporate decision-making. Other functions, such as IT, finance, legal and development make use of library resources in the course of their work, as needed. One library manager commented that library staff is very interested in providing Knowledge Services and information delivery for senior management staff. Not only would the activity be valuable to management but ("not to be too altruistic about it"), providing such services is a natural high-visibility effort. Word of mouth comments from senior management would be to the library's advantage and have a positive influence on how the library is perceived in the institution's organizational culture.

As can be seen from the above, high-level, value-added services have been included in the offerings of several specialized research libraries. From our work, we conclude that the following activities and services can be considered essential for a world-class specialized research library:

1. A formal, structured marketing program for raising awareness about library services, to ensure that all of the library's stakeholders are informed about the strategic role of the library in the parent organization.
2. Strategic learning and training specifically focused on how the library can benefit organizational staff in their work. Whether the library has its own strategic learning program or offers its learning activities through collaboration with the parent organization's staff training and development function, the library's offerings, as such, require specific and dedicated effort.

3. Electronic resources, particularly "push" technology products for direct desktop delivery to the library's customers.
4. Interlibrary loan/document delivery management services that provide the highest levels of customer-initiated requests, with product delivery directly to the customer.
5. Consultation services offering various levels of service, from brief conversation and advice which is provided without charge, advancing through a structured consultation "tree" to the offering of fee-based (or charged back) full-service research provision.
6. Research services for all functional units of the organization, including non-research organizational units.
7. Utilizing the organizational intranet, direct connection to the library's virtual "reference desk" or "kiosk" to a library staff member who is on duty according to a published schedule (or 24/7/365 when that's possible). When a library customer's need for advice arises, a link brings him or her to a live site where the query can be discussed virtually, and, when required, a follow-on telephone conversation can take place.
8. A distributed electronic tables-of-contents service for library customers.
9. Subject specialists and the implementation of an insourcing/research liaison program, with library staff available to be assigned, on an as-needed basis, to work exclusively with particular programs or activities.
10. An experts database, providing the parent organization with biographical and subject specialty information about employees, recognized authorities, leaders, and others who might need to be contacted or otherwise known about in the course of the work of the organization.
11. An informal but well-managed knowledge "area" on the organizational intranet, providing updates about current projects, requests for information and advice about projects, etc.
12. An organizational "knowledge store" or clearinghouse, capturing and providing for the dissemination of information about programs as they are implemented, so that as knowledge is developed it is recorded in such a way that it can be shared as required.

The strategic benefits of services provided by world-class specialized research libraries can best be identified by looking into an organization's management framework, probably through the implementation of a well planned and organized Knowledge Services audit. Once a determination has been made as to the level or services required, the trends identified here can be considered and, as appropriate, used as a model for providing Knowledge Services for the organization. It then becomes clear – to all in the organization – that the specialized research library is attempting to provide its customers the services they need and desire. By invoking Knowledge Services as its management framework, the library ensures that collaboration, knowledge development and knowledge sharing, and an achievable social infrastructure are in place, leading to the successful achievement of the organizational mission.