Cloud-based Library, Information, and
KM/Knowledge Services Solutions

Soutron
GLOBAL

From Collections To Connections

Managing the Transformation of Libraries into
The Digital Resource Centers of the Future

A Soutron Global White Paper

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QUICK TAKES:

- Corporate and organizational success ("organizational effectiveness") requires high-quality enterprise-wide knowledge development and knowledge sharing (KD/KS); all collection management and related knowledge-utilization activities must adhere to the same high standards.

- KD/KS excellence is delivered through knowledge services, defined as the management and service-delivery methodology that brings information management, knowledge management (KM), and strategic learning into a single, over-arching operational function.

- Two critical elements support knowledge services and define the organization as a knowledge culture: a collaborative corporate environment enabling the highest levels of knowledge sharing and information technology providing the highest levels of information capture and transfer.

- Likewise, the tools for managing knowledge services have a dual role, supporting human interactions that enable strategic learning and discussion and enabling content access. Successful KD/KS requires both.

- In the modern organizational management and research environment, libraries – and specialized libraries in particular – are positioned to function as the organization's central research management operation. With this transformation, libraries take on the role of knowledge services nexus for the organization or, depending on the circumstances, for the larger department or designated practice groups.

- Thus the specialized library enables information and knowledge seekers to connect and collaborate with others (wherever located) and to identify and work with content captured in collections (wherever located and however defined) to enable successful KD/KS.

KEY WORDS: information professionals, ILS, integrated library system, KD/KS, KM, knowledge development and knowledge sharing, knowledge executives, knowledge management, knowledge professionals, knowledge services, knowledge strategy, knowledge strategists, knowledge thought leaders, knowledge value, knowledge workers, libraries, librarianship (specialized), management, organizational development, organizational effectiveness, special librarians, special libraries, strategic knowledge professionals

The Changing Organizational Management Environment. Over the last decade – and in some cases stretching over the prior decade or so – corporate and organizational leaders have become aware of the benefits of high-quality information and knowledge management (KM).

It has been a phenomenal recognition, this sea change in organizational management, and it affects every information and knowledge exchange that takes place in every functional unit of every company or organization (indeed, some make the case that this move toward quality information and knowledge sharing is taking place in society at large).

So it is no surprise that with all the talk about "big data" and "drowning in information," companies and organizations have devised new approaches to information and knowledge management. What we are witnessing is nothing less than a cutting-edge opening for innovative thinking, as enterprise leaders think about their company's intellectual capital, and about how critical it is to manage that knowledge carefully.

While all organizations do not "naturally" (we might say) sign on to this recognition of the benefits of high-quality information and knowledge, many if not most of the people working within the organization are aware of the need. Information and knowledge content collections are continuously being built throughout the company.

Even in companies where no specific attention is being given to moving into well-managed information and knowledge delivery, workers are collecting content about what they do. They are attempting to develop solutions so they can access what they require in what has been collected. In many cases, these knowledge workers (as Peter F. Drucker described them) are building databases to lead them to content in resources, both internal and external. In other cases they are simply recording what work has been done, how it was done, and incorporating content to ensure that information about the work can be reviewed and, if required, replicated.

In all of these organizational knowledge-domain situations (that is, any situation in which knowledge is developed and shared) the objective is to ensure end results that benefit the larger organization. Corporate and organizational success (sometimes referred to as "organizational effectiveness") requires high-quality enterprise-wide knowledge development and knowledge sharing (KD/KS), and all collection management and related knowledge-utilization activities must adhere to the same high standards.

Four conditions apply:

1. Enterprise-wide leadership and senior management recognize the value of well-managed information, knowledge, and strategic learning in corporate success
2. The company's specialized library transitions into the company's strategic knowledge function, becoming the organization's strategic knowledge business unit/operational function
3. The organization's specialist librarian becomes the company's strategic knowledge professional, the knowledge thought leader for the company.
4. KM/knowledge services tools support enterprise-wide (or departmental) content management and enable collaboration throughout the corporate knowledge domain.

Managing Information, Knowledge, and Strategic Learning in the New Management Environment.
With successful KD/KS as the organizational goal, and with so much attention being given to corporate
intellectual capital and its management (what we call "knowledge management" or "KM"), we often find
ourselves speaking about the difficulty of "managing" knowledge. It's not an easy concept to convey to
colleagues or enterprise leaders.

Instead, we turn to knowledge services, the management and service-delivery methodology – a way to
work – that combines information management, KM, and strategic learning into a single over-arching
operational function.

It is through knowledge services that
excellence in KD/KS is achieved.
Knowledge services, as a management
methodology, recognizes that the most
critical asset of any group or
environment is what its people know. It
is a concept that has stayed with us,
ever since Thomas A. Stewart presented
it in his 1997 book, *Intellectual
Capital: The New Wealth of Nations*:
"It's the sum of everything everybody
in your company knows that gives you
a competitive edge in the marketplace."

With knowledge services, the strategic
knowledge professional combines KM
with what is already being utilized and
identified as productive. On a daily

KNOWLEDGE SERVICES: The *Practical* Side of KM
"Putting KM to Work"

TRANSITIONING
- Information, Knowledge, and Strategic Learning to *Strategic* Knowledge

ENABLING
- Contextual decision-making
- Accelerated innovation
- Strengthened research
- Excellence in knowledge-asset management

SUPPORTING
- An enterprise-wide knowledge culture
- Strategic KD/KS
- Organizational effectiveness

basis, most knowledge workers deal with information management and strategic learning, both of which
are important disciplines and management tools in every well-run organization. When organizational
management and the company's strategic knowledge professionals put them together with KM and devise
procedures for converging information management, KM, and strategic learning, the organization has
now moved into the realm of knowledge services, the management and service delivery framework that
seems to be the very solution these knowledge workers (and their employing organizations) require.

As a management and service delivery framework, knowledge services enables organizations to put
theoretical and not always clearly defined KM to work, moving to the practical side of KM. In doing so,
knowledge services enables strengthened research, contextual decision-making, accelerated innovation,
and successful knowledge asset management, the four elements that make up the very foundation of
successful KD/KS and provide critical support to the larger organization as a knowledge culture.
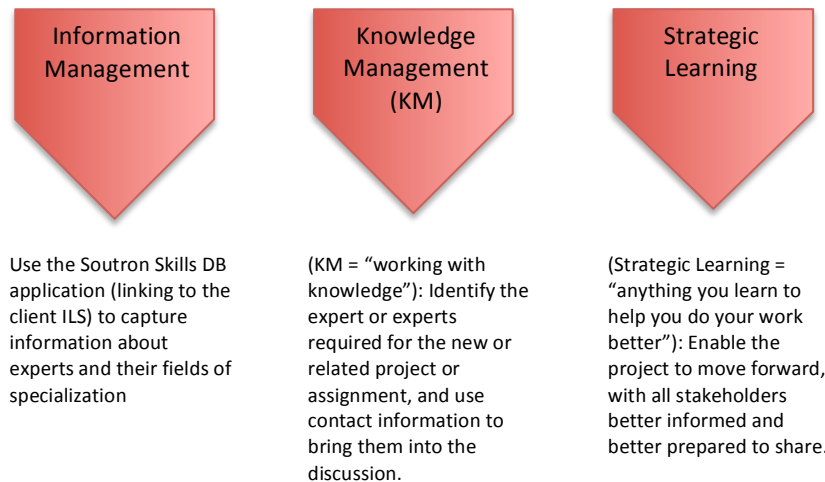
As a construct for handling masses of information and focusing on how it is used, knowledge services
provides the organization with the tools its people require for ensuring that the organization's intellectual
assets are captured, organized, analyzed, interpreted, and customized for maximum return. It does so by
looking at two critical elements in the process: a collaborative corporate environment enabling the highest
levels of knowledge sharing and information technology to provide the highest levels of information and
knowledge capture and transfer.

A popular example of knowledge services value is demonstrated in the development of the Soutron Skills
DB application, a directory for use within the company or organization in which the specialist librarian
(or other strategic knowledge professional with KD/KS management responsibility) is employed.
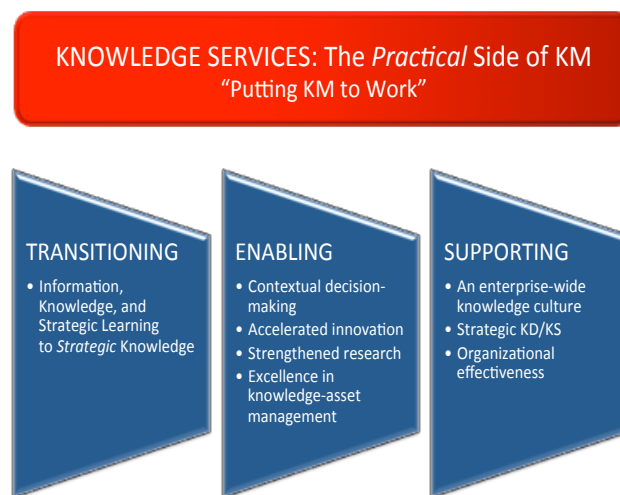
Designed to link employees undertaking a new project or working with a knowledge-development activity with others in the organization, the Skills DB leads to strong internal knowledge sharing.

With the Skills DB application, offered as part of the inclusive framework of the Soutron information management solution, the knowledge services convergence of information management, KM, and strategic learning works for the larger enterprise:

Information Management	Knowledge Management (KM)	Strategic Learning
Use the Soutron Skills DB application (linking to the client ILS) to capture information about experts and their fields of specialization	(KM = "working with knowledge"): Identify the expert or experts required for the new or related project or assignment, and use contact information to bring them into the discussion.	(Strategic Learning = "anything you learn to help you do your work better"): Enable the project to move forward, with all stakeholders better informed and better prepared to share.

Thus knowledge services, as a management and service-delivery methodology, enables success in the structure and utilization of the larger organization's knowledge domain through two integrated and connected components, its support framework for human interactions and its electronic solutions (for locating and accessing captured content), both equally critical for successful KD/KS.

The New ILS. As demonstrated in the example above, it has become clear that the Integrated Library System (generally referred to with the ILS acronym, or sometimes as the "Library Management System" or LMS) is not just for libraries. Discussing the ILS as a tool for libraries does, however, provide a convenient opening for thinking about an organization's specialized library and its potential for positioning itself as a leading and highly responsible function in the corporate management structure.

As a library management system, the ILS has traditionally been used for bibliographic control and user engagement in libraries and similar research-focused organizational or corporate functions. Generally speaking, there are four attributes for this traditional ILS:

- functions as a relational database
- includes integrated modules for unified interface
- permits tracking of records at a variety of content levels and needs
- permits tracking of activities and "extra" modifying constructs to ensure desired connections between user and content

In most organizations, it is obviously customary to use the ILS as the OPAC (online public access catalog) for the corporate library. With the flexibility built in to the Soutron product, there is additional functionality, enabling the organization to utilize the ILS beyond the library, even beyond other "research-related" functions. It's a level of re-purposing that is even possible without changing the descriptor, since the "library" of the "Integrated Library System" title can refer to any collection or

repository in the company (and in any location, physical or digital). With the Soutron ILS, such re-purposing of the ILS can be expected as it supports:

- effective management of multiple content repositories: corporate library, a departmental projects "knowledge bank," records, and archives for a wide range of operational and regulatory requirements (HR, financial, legal, etc.)
- flexibility for all formats and content types
- practical intellectual capital management and usability (enterprise-wide or department-wide, as required)

It's not a case of "old wine in new bottles," this variable usability that ILS users and corporate management require and are asking for. Such re-design requirements – for the modern company's knowledge domain – naturally fall into place as an organization's knowledge services staff seeks to meet specific corporate and organizational needs.

Which moves the conversation about the successful ILS in a new direction, one that converges information technology and enterprise content management (ECM) with knowledge services. As noted, highest-standard infrastructure design and implementation management (or simply technology management, we might call it) meet with and provide highest service-delivery levels, connecting with the "human" side of information management, knowledge management, and strategic learning.

Meet the New ILS. In any conversation about selecting an integrated library system (having first assessed requirements), the starting point focuses on the flexibility of the database. Such flexibility must be relational and it must be well supported, since a long-term future is an absolute for a corporate or organizational repository. Other important selection criteria – present with the Soutron product – is the presence of on-going development and support. Equally important is built-in indexing, meaning that no third party systems will be required, a distinct advantage simply because, when used, third party systems result in an ILS more complex than it needs to be.

As a management tool for an organization's corporate library, flexibility in the ILS is obviously important. The move to digital content and digital records means that record templates and structures for recording metadata are no longer based solely on bibliographic records. The modern library is a repository for all types of metadata, including digital media such as electronic documents, images, know-how, and access to online sources. Freedom to have field choices match data being held, along with forms that match user needs and do not require training are essential, ensuring that any type of information (whether relating to "typical" library collections, other research materials, or, indeed, any other collection at all, of any content, should be capable of being managed in the database).

As mentioned earlier, it is equally important that the database is relational, in order to easily cross reference and link assets. With this level of flexibility, finding information related to another asset can be carried out intuitively and effectively. Some systems do not exploit the power of the RDBMS (relational database management system) and instead transfer flat file legacy system structures onto the new database. It is unfortunate that these sorts of structural "weak-links" are found in some ILS designs, for they

Soutron Product Attributes

Task Services to Schedule Notices and Reports

Full-Text Indexing

24/7 Online

Automated Backups

Real-Time Updating

Easy to Administer
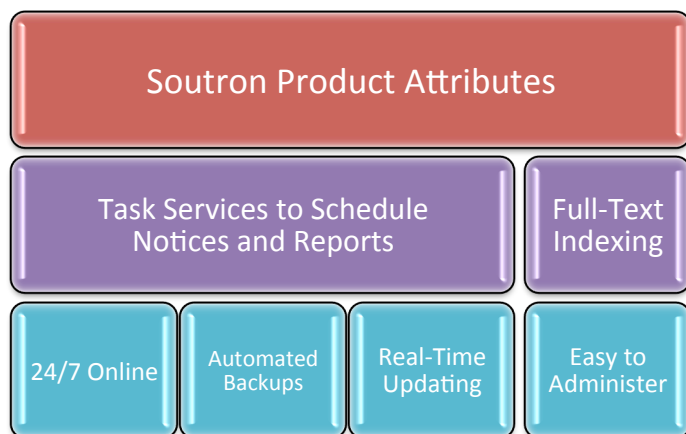
perpetuate complexity and do nothing to bring efficiency and order to a knowledge set. Indeed, they may – in the long term – inhibit system development.

Finally, the system and database must be capable of being configured without the need for in-house IT expertise. To this purpose, the Soutron database includes the attributes noted here, all of which should be expected in and delivered with any well-designed ILS.

The mix is particularly important to Soutron Global clients. At the Royal Canadian Military Institute in Toronto, RCMI Librarian Penny Lipman, B.A., M.L.S., needed an efficient solution which could accommodate not only the books in the RCMI collection, but also a solution that could seamlessly evolve to incorporate photographs and archival material.

Additionally, she required a system that securely provides a web-based searchable catalog with basic "guest" gateway access and a "login" for exclusive member-only feature access.

Since choosing Soutron for the RCMI library catalog Lipman has been particularly impressed by the product's Library of Congress auto cataloging feature, which she describes as "an invaluable help" with the collection backlog, as it "lightens the load," as she puts it, "for the solo librarian."

Penny Lipman also comments about how pleased she is with dealing with Soutron Global.

"I've been really happy with Soutron, their services, everything they've done. Soutron Global asked what I wanted and then provided it. Customer service is fantastic, and the tool is easy to implement and use."

Transforming Libraries: The New Specialized Library and the New Specialist Librarian. In order to meet the requirements of colleagues working in this "new" organizational management and research environment, libraries – and specialized libraries in particular – are being transformed. A company's specialized library is probably one of several operational functions providing knowledge services in the larger organization (although they all won't refer to what they do as "knowledge services"). As the library transitions itself into the company's strategic knowledge function, it is (or should be) the knowledge services nexus for the larger organization. It is also (or should be) managed for this enterprise-wide leadership role, or – depending on the environment – for the department or practice group.

This need was recognized as long ago as 1988 and noted in a valuable book about library planning edited by Donald E. Riggs and Gordon A. Sabine. In *Libraries in the '90s: What the Leaders Expect*, Riggs and Sabine reported that Joseph A. Rosenthal, University Librarian at the University of California at Berkeley, startled colleagues by noting that future success in KD/KS would look like this (although Rosenthal did not, of course, use our language):

- Librarians will become more like special librarians. They will deal more in information and less in simply saying, "Here's the bibliographic apparatus; it's up to you to find out which things you want." In certain situations, they may come to function more as part of a research team….
- There will be different protocols for accessing data…. Librarians will be kept busy trying to translate those protocols into simpler language for the researcher and trying to train people to use, to access, these different spheres of information.
- The better librarians are at doing this, the more their services are going to be in demand. So to the extent that we and our successors are good, we will be building demand for our services.

That's how it turned out, isn't it? And at the very center of this attention to a new model for managing information and knowledge is the organization's specialist librarian. More than any other employee (and regardless of the name of the function – "special library," "research center," "knowledge resource center,"

"research management unit," *etc*.), the manager of the specialized library has the experience, expertise, and foundational management proficiency to ensure that research results are identified and/or delivered to constituent information and knowledge customers.

This strategic knowledge professional has management responsibility for research support, leading the acquisition, storage, delivery, and (when appropriate) re-use of the organization's intellectual capital. At the same time, the specialist librarian's particular task is often to oversee (or advise about) the creation of new corporate knowledge, ensuring that it is delivered for the specific purpose of supporting organizational effectiveness. In this role, the organization's specialist librarian (or the manager of the specialized library and his or her team) becomes the company's knowledge thought leader, the "go-to" person for knowledge-services delivery, regardless of how their operational business unit is designated, the individual job title, or educational qualifications, experience, or expertise.

Under these conditions, the role of the specialist librarian transitions into a new and critical leadership role, with management responsibility that relates directly to organizational effectiveness. Just as the name of the operational function now includes a long list of workplace descriptions, as noted above, so the job titles for the people who work in and manage these functions have multiplied. Myriad titles are now found in job descriptions for these knowledge workers, and it is not uncommon to hear the information professionals who in another time would have been called "special librarians" referred to as something very different in the long list. Indeed, there is even a story (perhaps apocryphal) that an attempt at SLA (the Special Libraries Association) to identify the different and various job titles for its members got up to 200 and the counting stopped. It was turning out to be an impossible job!

So what has changed? It's the work and the expectations of customers and enterprise management. Whereas the specialist librarian in the past – like most librarians – was expected to be reactive in his or her interactions with the people who availed themselves of the library's services, by the early 1990s reactive service delivery was no longer the model. The librarian was no longer waiting for the user to come to the library to ask a question, for there was now a move to what was called "proactive" service.

The proactive specialist librarian went out into the organization, becoming acquainted with the different projects being undertaken or planned. Once the librarian had enough information, he or she would fall back on his or her professional expertise to match the need with the resources and information consultancy service that could be provided through the efforts of the specialized library and its professional knowledge workers.

From *Reactive* To *Proactive* To *Integrated and Interactive*
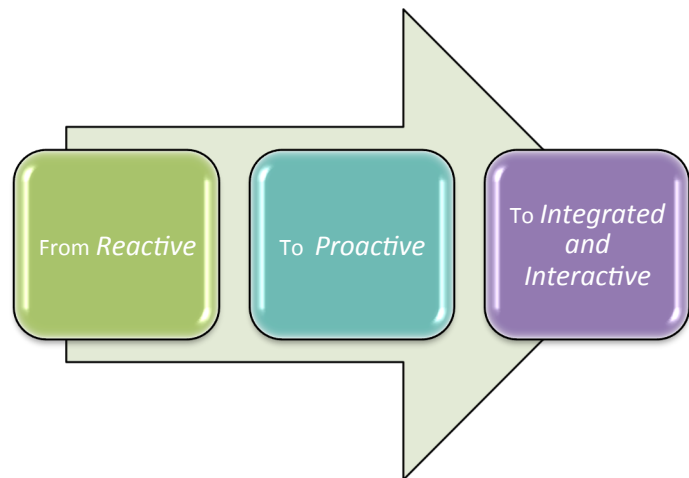
That picture, too, changed in the early years of the 21st century, since proactive specialized library service delivery did not always match the needs of the library's identified user base (and, indeed, by this time the "library" had – in many organizations – transitioned to that specialized research operation described earlier). The research function's customers and clients – no longer "users" coming to a "library" – brought the specialist librarian/research specialist/strategic knowledge professional into a much more interactive and integrated role in the overall research and KD/KS activity. Now the specialist librarian (or perhaps "former" specialist librarian, depending on what his or her current title might be) was expected to not only manage the operations of the research function and, as required, to link the information or knowledge seeker to the needed content or knowledge-sharing entity. By now

the responsibilities formerly incorporated into the work of the ("former") specialized library had been re-positioned as part of the research function *beyond* the library function.

Here are two examples. In the first we have the librarian or strategic knowledge professional *embedded* in, for example, a product development team. His or her role is to sit in on planning discussions and advise about the research process, specifically in terms of the project or situation under discussion. This knowledge professional becomes an in-house consultant for the project team and, in many cases, is literally seconded from the library or research function in which he or she is usually employed and located – both administratively and, often, physically – with the particular project.

Another example is even more specific. At one large research organization, programs were decided upon and funding estimates discussed in meetings of subject specialists and program officers. The organization's knowledge resources center was already advising various program divisions through established knowledge-focused activities (such as designing and conducting educational and coaching sessions, or providing subject-focused current news alerts). So it was a natural next step to move deeper into outreach ("playing the advocacy game" was the way the center's director described it). The result was arranging for strategic knowledge professionals from the knowledge resource center's staff to participate in every planning meeting.

The strategic knowledge professional – the organization's knowledge thought leader – was in the discussion for particular reasons. First, he or she was to ensure that program planners identified and targeted appropriate collaborators. Secondly, he or she advised about estimated research costs, enabling program directors to have a more accurate gauge of what the expenses for the planned program would be.

The advantage for the larger organization soon became obvious. Not to be dismissed, though, is the advantage to the knowledge resources center itself. When it comes time to review support for the larger, overall organization, research allocation authorities (read: senior management) are often tempted to question the ROI of internal research support. When a professional staff member from the knowledge resources center is participating in every program planning meeting, their leadership role – as part of management – is not only recognized but comes to be expected.

The New ILS Vendor. In thinking about how we move from focusing on collections to connections, a final observation takes into consideration the relationship between the organization acquiring the ILS and the ILS vendor. The difference between vendors is not always immediately apparent to clients and prospective clients. Is there a single differentiator that sets the "collection-to-connections" focused vendor apart from others? Soutron Global is well known for its commitment to its clients, for its much-recognized corporate mantra ("When we make a promise, we keep it."), and for the well-known service philosophy that begins with asking clients, "How can we help you do your work?"

Yet Soutron Global goes one important step further, taking KD/KS into the marketplace with its clients and potential clients. Committed to making a difference in the lives of information and knowledge professionals (and not only with the quality of the Soutron product, for which the company is well known), Soutron Global is also recognized for bringing practical, hands-on strategic learning to the company's many clients and colleagues – and to others working in specialized libraries, research management units, records management and corporate archives, or in any of the other functions of the organization's so-called "knowledge domain."

It fits, for there is much conversation today about how we live in this new "golden age" of knowledge services, and one of the hallmarks of this time is knowledge development and knowledge sharing, the KD/KS referred to so often in this paper.

In many respects that knowledge sharing is exactly what Soutron Global is doing. Unlike other information management companies, the Soutron Global team feels an obligation to share the knowledge it has developed, allowing others to benefit from the company's vast experience in knowledge services. It's a new – and unusual – role for a technology company, a special new approach to working with clients in the role of educator and knowledge sharer. In this role, Soutron Global actively brings strategic learning about information management, knowledge management, and strategic learning to the public and, in the process, bringing Soutron Global itself closer to its clients and potential clients.

Asked about this role for ILS vendors, Soutron Global President and CEO Tony Saadat speaks about the "emerging place in the automation marketplace for strategic learning." Clearly, strategic learning is the differentiator for Soutron Global as a player in the information management market.

"Providing easy access to information and knowledge is the first step in the overall process," Saadat says. "What the knowledge worker does with it and how they are able to share and collaborate with others will be the keys to their success. At Soutron Global, we're always looking for ways to provide collaboration capabilities and we will continue to move in that direction. Strategic learning is there. It's built in and it's simply part of what we do. And it will continue to be part of the Soutron product."