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**Information Professionals and Our Scalability Problem**

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So what’s your biggest problem? If you filled out a simple three question survey with two ‘forced’ choices, what do you choose?

1. I need more: □ Time □ Money
2. I need more: □ Technology □ Budget
3. I need: □ Better Questions □ Stronger Relationships

* Ever ask for more hours in the day?
* Ever try to serve clients that span the globe and all time zones from core work hours in one time zone?
* Are you solo or part of a very small team with big expectations for service?
* Do you feel you’re underused for the best stuff and overused for simple research?
* Feeling buried in administrivia and information overload?

Sound like your situation? It probably does. The need is so great and we’re often the bottleneck or gatekeeper to effective information strategies when our services are designed around personal contact, relationships and service.

So how do we scale when you’re only one professional and care enough to make a difference?

1. **Be realistic**

Start with being reasonable. You can’t do it all. Simply, any organization’s information needs dwarf any information professional. So, prioritize, prioritize, prioritize! Priorities should be based on: strategic alignment, mission criticality, and decision-making impact. These trump efficiency and cost concerns every time. My useful metaphor is the parent with the messy house and happy, balanced children – it shows a fundamental understanding of priorities. So, focus less concern about the trivial and more effort on the important.

**Scalability Tip**:

How do you scale priority setting? It’s simple really. You build relationships with those who set the priorities for your unit or enterprise. It might be your boss but likely isn’t just that person. You’re an information professional and have a valid reason to interview and seek out advice from the key people in your organization. Ask for the time to talk to them. After discussing organizational needs and priorities, in the context of your organization’s mission and vision and your own personal role, you’ll have much better insight into which of your efforts actually matter. Never neglect conversations with people who matter.

1. **Get to the user – not the desktop**

What can we put out there to end users for self service and how? Then do it. Intranets, internal systems, and knowledge and information portals are already a great opportunity for librarians and information professionals. Sadly, often these are built with an “If we build it, they will come” cornfield mantra. Also they tend to be framed as desktop initiatives. So the real strategy is alignment with workflow and decision-making as opposed to generic research sources.

**Scalability Tip**:

Are your portals and intranet sites organized around workflow and decision flows or do they more closely resemble lists of digital and print resources, catalogs, or bibliographies? The distance between lists and user needs is a wide chasm that cannot be leapt by the end user in two shorter jumps. The best way to scale is to align the information with the core critical decisions that need to be underpinned with great, quality information in your enterprise context. You can have a professional portal where you keep everything for reference, but when addressing end user context you can scale better or success by aligning with their work flows and not generic research tasks. Really consider this strategy as one where you off-load quick reference volume to focus on making time for impactful strategic research agenda.

1. **Train and train well.**

It’s essential to train your end users not just for searching skills but for research process skills in general. And, critically, these training sessions need to focus on the user’s needs in their work context beyond just effectively communicating what’s there on the portal or intranet.

**Scalability Tip**:

In recent years technology has transformed training. Scalability of training is by definition being able to train and coach more users, more often and with greater, measurable impact. So what do the opportunities in these technologies mean for your training strategies?:

* Skype
* Google Hangouts
* eLearning
* WebEx/AdobeConnect, etc
* Self-directed training (23 Things)
* Overviews (LibGuides, Paths, etc.)

All of these technologies help put the librarian back into the research equation and support research negotiation, training, skills transfers, reference interviews, and more. Otherwise your digital presence may be merely a fancier bibliography.

1. **Get thee to the Cloud.**

The cloud provides opportunities that have hitherto been a pain in the butt. The detritus of frustrating and detailed tasks involved in maintaining infrastructure seem to multiply over time. And it’s all expensive and the management tasks in justifying and doing them create a ripple effect on your time that just doesn’t give the value for effort returns. Upgrading servers and justifying same is a time sink. Installing and upgrading software can be a treadmill especially when customization and localization is involved. Stop the insanity.

**Scalability Tip**:

Move your infrastructure to the cloud with the best service level agreement you can get. Now, you’re always up-to-date on software and your server and connection speeds are scaled to beyond your capacity as a sole site. You lose little or nothing in flexibility and gain a lot of time in TCO (total cost of ownership). Don’t value your own time at zero in these analyses since that’s more valuable than actual money in in much more limited supply.

1. **Don’t just have mobile, BE mobile.**

The times are no longer there where you can afford to be tied down to a desk or office. 21st Century information pros are where the user is or accessible from wherever the user or the information expertise is. Mobile devices are no longer optional in our work and the reference desk is no longer the prime paradigm – it’s merely an anchor for service points.

**Scalability Tip**:

Do your job by walking around. Be where your users are. Get the best apps for your mobile devices and be really good at smartphones and tablets. Be the model researcher you’re supporting. Mobility aligns with your priority to build relationships where you can easily come to them and perform at 100% in person rather than requiring them to come to you. Your key collections and services are digital and your client users are more mobile than ever before. Align.

1. Use your filters and alerts.

E-mail is a drudge task. Too much and too full. It seems a productivity suck and steals time from your more important work. At its worst it leaves you with the impression of busyness while taking time away from the important tasks of being effective and having an impact. Indeed falsely confusing the urgent with the important is a symptom of trouble to come.

**Scalability Tip**:

Obviously you can’t stop being digitally connected through e-mail and social media. It’s a great opportunity to engage in two-way dialogue with our clients as well as to be permissioned into ‘friend’ relationships on a entry-level basis. That said, you’ll make your life a lot more strategically aligned if you:

* Schedule your use of e-mail and social media. Go so far as to put it on your calendar until you get better habits. Maybe e-mail 2-3 times a day and RSS feeds once in the morning while social media dipping in twice at work instead of all the time. You’ll gain in focus what you lose in immersive long conversations.
* That said; get really good at using your e-mail filters strategically. The ability to file in folders and color the links and rank e-mail is just so useful and productivity enhancing. For example who are your most important users (your boss, team leader, etc.)? Rank them as high importance and color them red and read them first. Your association and volunteer e-mails? Send them to a folder and deal with them all at once. You’ll benefit from seeing entire threads. Special projects, friends and family, etc. can all be pre-organized for more productive reading and you can time that reading for home or office.
* I live on my RSS feeds (I use the Feedly reader and app). You can organize your feeds by any system you want (Hey – it doesn’t need to be anything special but based on your own needs). I organize mine to separate my family blogs and personal interests like politics and news feeds that I can read at my leisure from special projects and library stuff that I schedule to align with what I’m working on.
* I love my iPad and find the Flipboard app for my RSS feeds, social media like Facebook and Twitter as well as my magazine reading to be so much more effective that keeping a native site open in tab on my desktop.

1. **Scalability Tip**: **Meetings, Bloody Meetings**

Meetings seem to take up too much time and so often seem to go nowhere. Reframe your attitude. If you’re in a meeting and you fail to participate you’ve missed an opportunity AND failed. If you view the meeting as an event where information is transferred then don’t go and Just read the minutes or documentation and ask questions. Then again, go to the meeting and see it for the gift it is.

**Scalability Tip:**

The gift of a meeting is to do more than merely meet. That’s the lowest common result. The great meeting attendees do; the following:

* Engage in good followership. Ask clarifying questions.
* Volunteer for special projects that arise.
* Agree to take minutes – that’s a power role.
* Contribute during the meeting – for example offer to do research that assists with decisions or strategies for the group.
* Market yourself as a great resource and information professional. Personal positioning rises from good meeting behaviors.
* Build trust. Build relationships. In meetings you often you meet new players and new team members on their orientation tour. Don’t waste the opportunity to increase your presence, network and likability.
* Never, ever be negative. Know the difference between constructive criticism and critical thinking and plain criticism.
* Don’t arrive late and leave early, relationships are strengthened in those moments before and after meetings when grapevine insights are shared and social relationships that transcend the org chart are built.
* Use the time wisely to network, market and position yourself. You can even gain higher quality projects and questions with a long term meeting strategy.
* Follow up. For example, occasionally share useful information after the meeting.

If you went to a meeting and met no one new, didn’t speak, and didn’t improve an idea or clarify a goal, then seriously ask why you were there – rank, status, title, and politics are not great reasons. Indeed, you may have created the opposite impression to that which you intended.

So there you have it. Seven tips and simply stated! Of course, it’s not simple at all but with a little effort up front you’ll find that you’re, personally, more productive, better aligned with your organization and getting better work over time. You’ll grow as a leader and, with a little effort and new habits, make a bigger difference.