Welcome

Transforming Libraries:

What's Required?

May 7, 2013

11a.m. PST
2p.m. EST

Soutron Global Webinar Series

Transforming Libraries

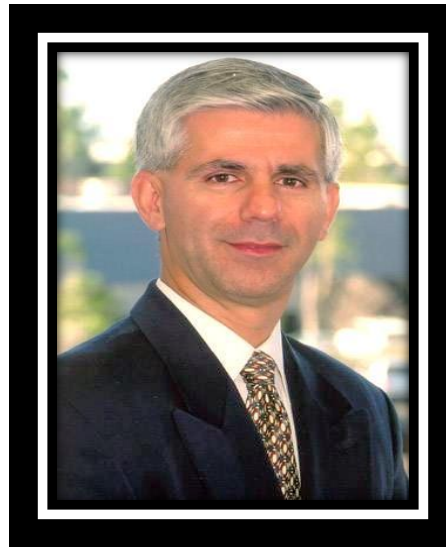## Today's Presenters
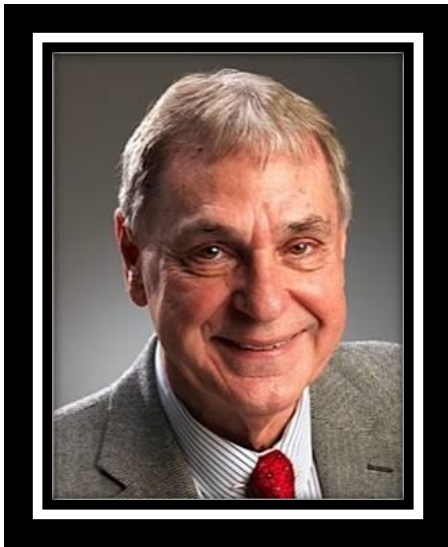
Guy St. Clair   Tony Saadat   Maria Phipps

Transforming Libraries

Future Ready !

Our presenter, Guy St Clair will discuss:

1. *What is the governance "picture" for sharing knowledge in your organization? Who **owns** the content?*
2. *Does your system allow for integrating this knowledge into the organizational workflow?*
3. *Can you and your team -- with the tools you have -- operate the specialized library as the company's **knowledge nexus**?*

We will follow with a brief presentation as to how we at Soutron Global are "future ready" with our Soutron ILS and Knowledge Management system.

Transforming Libraries

"Our goal at Soutron Global is to partner with our clients to manage the library transformation by introducing the best technology in the most cost effective manner…..

We have created a collaborative culture that is differentiated and unique….."

Tony Saadat

TRANSFORMING LIBRARIES: WHAT'S REQUIRED?

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Tuesday May 7, 2013

Guy St. Clair

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President and Knowledge Services Evangelist
SMR International

Lecturer and Special Advisor
M.S. In Information and Knowledge Strategy Program
Columbia University

Consulting Specialist for Knowledge Services
Soutron Global

Transforming Libraries: What's Required?

Our April 9 Webinar:

Knowledge Expertise=Knowledge Effectiveness

1. The relevance of the specialized library in *organizational* effectiveness
2. Knowledge services defined: the convergence of information management, KM, and strategic learning for organizational effectiveness
3. The specialist librarian's role in building (or strengthening) the company as a *knowledge culture*
4. And how we move from specialized librarianship to knowledge services: *re-brand/realign/embed*

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TRANSFORMING LIBRARIES:
WHAT'S REQUIRED?

Leadership	• Enterprise-Wide Collaboration • Shared Mission-Critical Focus
Professional Perspective	• Knowledge Services Expertise • Knowledge Thought Leaders
Tools	• Cross-Operational (X-Ops) • Subject and Function Agnostic
Workplace Model	• Corporate/Organizational ***Knowledge Nexus***

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Why Transform Libraries?

Management Expectations

- Market-driven management of the corporate/organizational "knowledge domain"
- Single, overarching knowledge strategy
- Excellence in knowledge services delivery (information management, KM, strategic learning)
- A new corporate workplace, a new environment managed by strategic knowledge professionals who see themselves (and are acknowledged) as corporate knowledge thought leaders.

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Why Transform Libraries?

Customer Expectations

from our definition of knowledge services—we practice information management, KM, and strategic learning management in order to provide:

- Excellence in research management/strengthened research delivery
- Contextual decision-making
- Accelerated innovation
- Superior knowledge asset management

Why Transform Libraries?

Customer Expectations

- Dale Stanley:

    "Knowledge services is about *knowledge catalysis*, the creation of knowledge *value* through knowledge development and knowledge sharing (KD/KS) – finding and leveraging opportunities to produce high-level research, strengthened contextual decision-making, accelerated innovation, and excellence in knowledge asset management."

The Strategic Knowledge Professional is the Catalyst – The Role is to Facilitate Knowledge Development/Knowledge Sharing (KD/KS) in the Larger Enterprise

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POLL

In your opinion, is your library prepared for meeting your company's research demands for 2018 (five years from now)?

Poll Results (during the presentation):

Yes	18%
No	38%
Don't Know	44%

Transforming Libraries:
What's Required?

1. *What is the governance "picture" for sharing knowledge in the organization? Who **owns** the content?*

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Transforming Libraries:
What's Required?

Data/Information/Knowledge Governance

Understand that the company's intellectual capital does not "belong" to individuals.

It is a corporate/organizational knowledge asset.

The strategic knowledge professional—the specialist librarian, research manager, or other knowledge leader—works with management to assign ownership or develop a sort of "federated" ownership framework.

Transforming Libraries:
What's Required?

Data/Information/Knowledge Governance

Often connects with compliance and regulatory issues, looking at management issues having to do with intellectual property ownership, e-discovery, date/information/knowledge lifecycle management, retention, and connects specialist librarians with records coordinator and corporate archivist

Critical: join with the company's knowledge domain leaders (perhaps that's you?) to appoint a knowledge point person for each unit or department dealing with information, knowledge, or strategic learning.

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Transforming Libraries:
What's Required?

Leadership
- Enterprise-Wide Collaboration
- Shared Mission-Critical Focus

Enterprise-wide leadership and management recognition of the value of information/knowledge/ strategic learning to corporate success, with responsibility and accountability for knowledge development/knowledge sharing (KD/KS).

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Transforming Libraries:
What's Required?

| Leadership | • Enterprise-Wide Collaboration
• Shared Mission-Critical Focus |

"How does an information professional transform themselves into a knowledge strategist? By recognizing a need and filling it. In my case I am actively looking for ways to partner with firm leaders and other department heads on how best to inform and manage firm projects."

—Jill Strand
SLA Leader

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Transforming Libraries: What's Required?

Transitioning the specialist librarian/information professional to the company's ***strategic knowledge professional*** (or one of a ***team*** of strategic knowledge professionals), recognized as 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.

- Strategic: "highly important to or an integral part of a strategy or plan of action"

- Knowledge: "The sum or range of what has been perceived, discovered, or learned"

- Professional: "A skilled practitioner; an expert."

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Transforming Libraries:
What's Required?

The strategic knowledge professional's purpose is to ensure that ***strategic knowledge*** is developed and shared enterprise-wide. The strategic knowledge professional brings experience, expertise, and a KD/KS (or KD/KS-like) background to working with strategic knowledge and can include:

- Specialist librarians, information specialists, records coordinators, database managers, archivists, *etc*.
- Internal training/strategic learning specialisst, with subject-related and KD/KS expertise
- Social media and electronic content access and retrieval experts
- Knowledge services experts, with a focus on internal enterprise-wide client-service, cross-functional knowledge services delivery

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Transforming Libraries:
What's Required?

Professional Perspective	• Knowledge Services Expertise • Knowledge Thought Leaders

Specialist librarian as knowledge strategist:
1. Meaning maker—helps people make choices
2. Voice of reason—establishes the value (and role) of knowledge development and knowledge sharing (KD/KS)
3. Operator—the bridge between ideas and action

—based on Cynthia Montgomery
The Strategist: Be the Leader Your Business Needs
New York: HarperCollins (2012)

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Transforming Libraries:
What's Required?

Next Question, Please:

> *Does your system allow for integrating this knowledge into the organizational workflow?*

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Transforming Libraries:
What's Required?

A Strong, Useful, "Good" KM/Knowledge Services System:

1. Ownership is clearly established
2. Central or highly networked resource for all organizational content (even "non-research-related" content)
3. Accessible to all units of the organization
4. Works fast, with an effective infrastructure to ensure that users take advantage of the system's strengths
5. Kept up to date, with content design ensuring the latest version of captured content
6. Robust search engine, with a platform for enterprise-wide collaboration that encourages positive engagement from all corporate stakeholders and staff
7. Integrated into project workflows and thought of by user as the "first place" to go to do their work
8. Incorporates internal communications at levels required by the organization
9. Logical, intuitive, and—above all—user-friendly.

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Transforming Libraries:
What's Required?

Resource Description and Access (RDA) Standard Compliance

RDA … a standard for cataloging that:

1. provides instructions and guidelines on formulating data for resource description and discovery

2. supports clustering bibliographic materials to show relationships between works and their creators

3. enabling the disclosure of different editions, abridgements, translations, or formats of any work

4. permits information exploitation and KD/KS between a wide variety of information communities in addition to "usual" specialized libraries and similar research management functions.

Transforming Libraries:
What's Required?

Online Research Analytics (OAR)

[also On-site Analytics]

- Enables specialized libraries, research management units, and similar operational functions to leverage their own data and information, to determine the most effective methodologies for tracking and analyzing research use

- Incorporates established business and strategic intelligence tools and methods, including marketing, manufacturing, legal, and other research activities.

Transforming Libraries:
What's Required?

Tools	• Cross-Operational (X-Ops) • Subject and Function Agnostic

One Essential Guideline:

Establish an enterprise-wide content management team to establish criteria for content management and in particular to examine, text, and apply a taxonomy and tagging strategy appropriate for the level of complexity and finding capabilities the organizational/corporate staff.

Transforming Libraries:
What's Required?

Finally:

*Can you and your team—with the tools you have—operate the specialized library as the company's **knowledge nexus**?*

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Transforming Libraries:
What's Required?

More than *Transforming* is required.

For future success, we must *transition* the specialized library(or other knowledge services operational function) into the organization's strategic knowledge function, with strategic knowledge defined as the product of any interaction having to do with information, knowledge, and strategic learning (content or activity) that contributes to organizational effectiveness and mission-specific success.

The manager of that function is the company's strategic knowledge professional or—if appropriate in the environment—the company's knowledge strategist, with responsibility and authority for the management of the company's overall knowledge domain.

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Transforming Libraries: What's Required?

The corporate knowledge nexus:

Brings together all elements and functions of the knowledge domain into one centralized, holistic framework

- Start with what's already in place, with a review/assessment, the well-performed knowledge audit
- Use expertise as knowledge services specialists to identify opportunities for better/smarter workflow
- Establish milestones and negotiate performance measures
- Identify advocates and champions

Re-structure the specialized library as Knowledge Services Central

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Transforming Libraries:
What's Required?

Workplace Model	• Corporate/Organizational **_Knowledge Nexus_**

"Start thinking about your specialized library in 'big-picture' terms and think about how good it could be as the organization's knowledge nexus. You'll be surprised how soon the pieces will start to fall into place."

—Guy St. Clair
"From Special Library to Organizational Knowledge Nexus"
Information Outlook, June 2006

POLL

Can your library be "Knowledge Services Central" for your organization?

Poll Results (during the presentation):

Yes	51%
No	10%
Don't Know	39%

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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

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Transforming Libraries:
The 2013 Soutron Global Webinars
With Guy St. Clair (SMR International)

- *Special Live Seminar at the SLA Annual Conference* (June 10)
  > What's the Relevance "Level" of Your Specialized Library
  > [with SLA President Deb Hunt]
- Building My First Knowledge Initiative – What Do I Do? (June 25)
- Prioritizing (July 30)
  - 1) What Needs to be Done?
  - 2) Where Are the Gaps?
- How Does Successful KD/KS Affect Workflow? (August 27)
- Sponsorship and Leadership Buy-In (September 24)
- Managing the Change (October 22)
- The Strategic Knowledge Professional as Knowledge Thought Leader
  > - Influencer, Communicator, Doer (November 26)
- Your Career Prospects - How Do You Re-Focus Your Knowledge
  Work So That You Are *Indispensible*? (December 17)

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Perhaps of Interest
The SLA/SMR International KM/KS Certificate Program

The Courses

- KMKS 101 Fundamentals of Knowledge Management and
  Knowledge Services
  (Live in San Diego June 8 and online September 9-25, 2013)
- KMKS102 The Knowledge Audit: Evaluating Intellectual
  Capital Use (Live in San Diego June 7)
- KMKS103 Knowledge Strategy: Developing the Enterprise-Wide
  Knowledge Culture (online August 12-28, 2013)
- KMKS104 Networking and Social Media: Technology-
  Enabled Knowledge Sharing (online February 12-26, 2014)
- KMKS105 Change Management and Change Implementation in the
  Knowledge Domain (online October 15-30, 2013)
- KMKS106 Critical Success Factors: Measuring Knowledge Services
  (online April 7-23, 2014)

Contact: http://www.sla.org/learn/certificate-programs/cert_knowledge_mgmt/

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Contact information

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SMR International Blog: *SMR Int'l – Knowledge Services Notes*

(http://www.smr-knowledge.com)

Guy St. Clair Personal Blog: *Sharing Guy's Journey*

(http://gstcjourney.blogspot.com)

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Thank you

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