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

Transforming Libraries

Knowledge Services:
From Theory to Practice
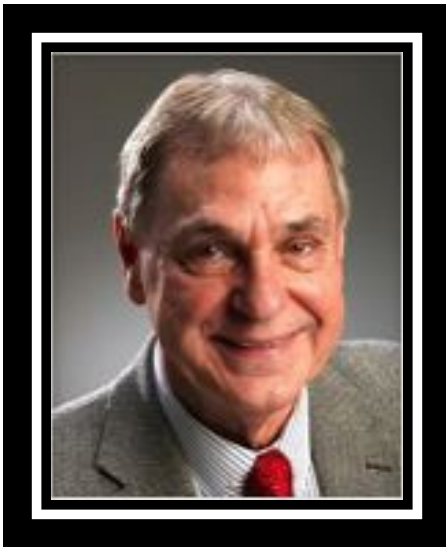
September 16, 2014
11.00am PST/2.00pm EST

Transforming Libraries

Today's Presenters

Guy St. Clair   Tony Saadat   Maria Phipps

Transforming Libraries

Future Ready!

Our presenter – Guy St Clair – asks:

1. *What is the most important question I ask myself as a specialist librarian/ information professional?*
2. *What quantitative measures replace (or coordinate with) "library-like" qualitative measures?*
3. *How do I "conserve what works and abandon what doesn't" and at the same time meet the client's Knowledge Services needs?*

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 into Digital Information Resource Centers

Knowledge Services:
From Theory to Practice

Guy St. Clair

President and Knowledge Services Evangelist
SMR International

Lecturer and Subject Matter Expert
M.S. In Information and Knowledge Strategy Program
Columbia University

Consulting Specialist for Knowledge Services
Soutron Global

Knowledge Services: From Theory to Practice

What we want to know:

Our first question:

What is the most important question I ask myself as a specialist librarian/information professional?

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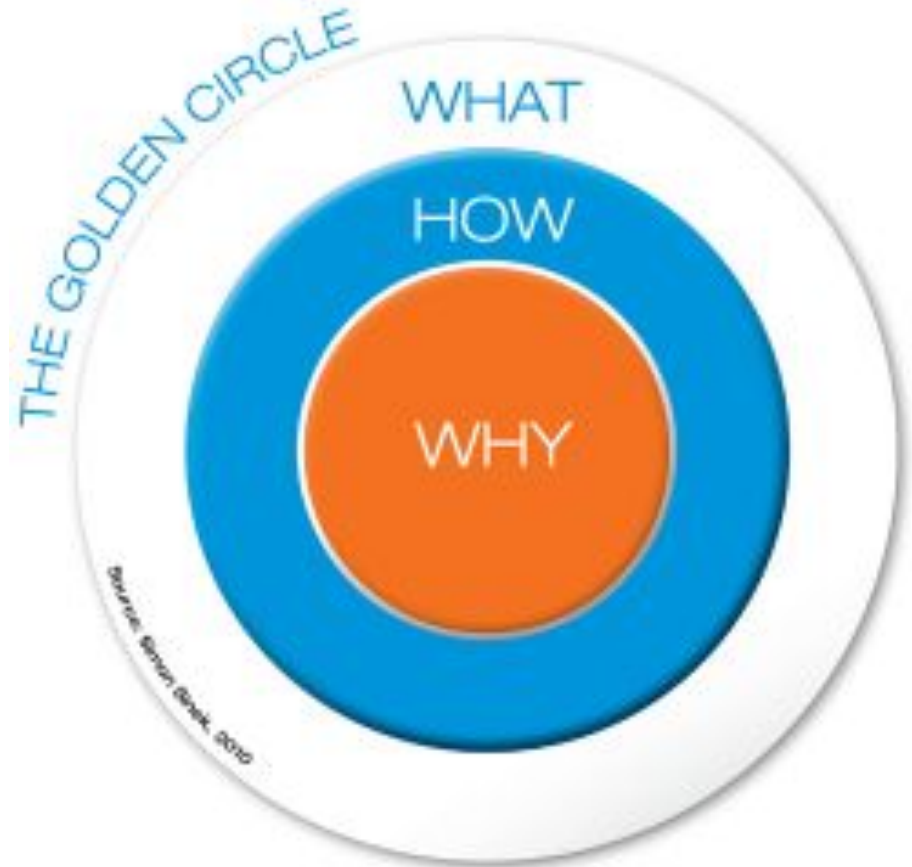
Why am I doing this?

Why is this organizational function a *specialized library*? (or "information center" or "research center" or whatever else your workplace is called)

Why am I here?

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Simon Sinek's Golden Circle

*Start with Why: How
Great Leaders Inspire
Everyone to Take Action*
(2009)

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Knowledge Services Theory

Expansive and Inclusive	• Converges IM, KM, and Strategic Learning
Enterprise-Wide	• Builds on the specialized library as the corporate knowledge nexus
Goal-Driven	• Successful knowledge development, knowledge sharing, knowledge utilization (KD/KS/KU)

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Knowledge Services

Knowledge Services

Information Management

Knowledge Management

Strategic Learning

Strengthened Research

Contextual Decision-Making

Accelerated Innovation

Successful Knowledge Asset Management

Roles

Information Professional

Information Facilitator / Consultant

Strategic Knowledge Professional

Knowledge Thought Leader

Approaches

From *Reactive* to

Proactive to

Interactive and *Integrated*

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Knowledge Services: From Theory to Practice

The Soutron Products

The Knowledge Services Framework

Match with Specialized Librarianship

The KD/KS/KU Result

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Knowledge Services: From Theory to Practice

The Specialized Librarianship/
Knowledge Services Connection

1. Enterprise-wide leadership and management recognize value
2. Specialized library = corporate knowledge nexus
3. Specialist librarian = corporate knowledge strategist/knowledge thought leader
4. KM/knowledge services tools support enterprise-wide (or departmental) content management and enable collaboration

Knowledge Value

Knowledge Services Tools

Organizational Effectiveness

Library = Knowledge Nexus

Librarian = Knowledge Thought Leader

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POLL

Polling Question # 1: In your opinion, how do you see specialized librarianship and knowledge services connected in your specialized library?

❑ Very strong connection   [14%]
❑ OK connection   [64%]
❑ Not very connected   [19%]
❑ Don't know   [3%]

[86% response]

A quick summary

Theory: Specialized Librarianship and Knowledge Services

Strategy / Value / Change enables
Excellence in KD/KS/KU (*and* provides a match between KD/KS/KU and organizational or corporate success)

Mr. Guy's Assertion:

Knowledge Value + Knowledge Strategy + Change Management = Successful KD/KS/KU

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Knowledge Services: From Theory to Practice

The *practice* of specialized librarianship/knowledge services:

1. The ongoing pursuit of a craft or a profession (*i.e., a knowledge services professional or a professional specialist librarian)*

2. Actual operation or experiment, in contrast to theory (*i.e., that may work in theory, but will it work in **practice** in my specialized library*?
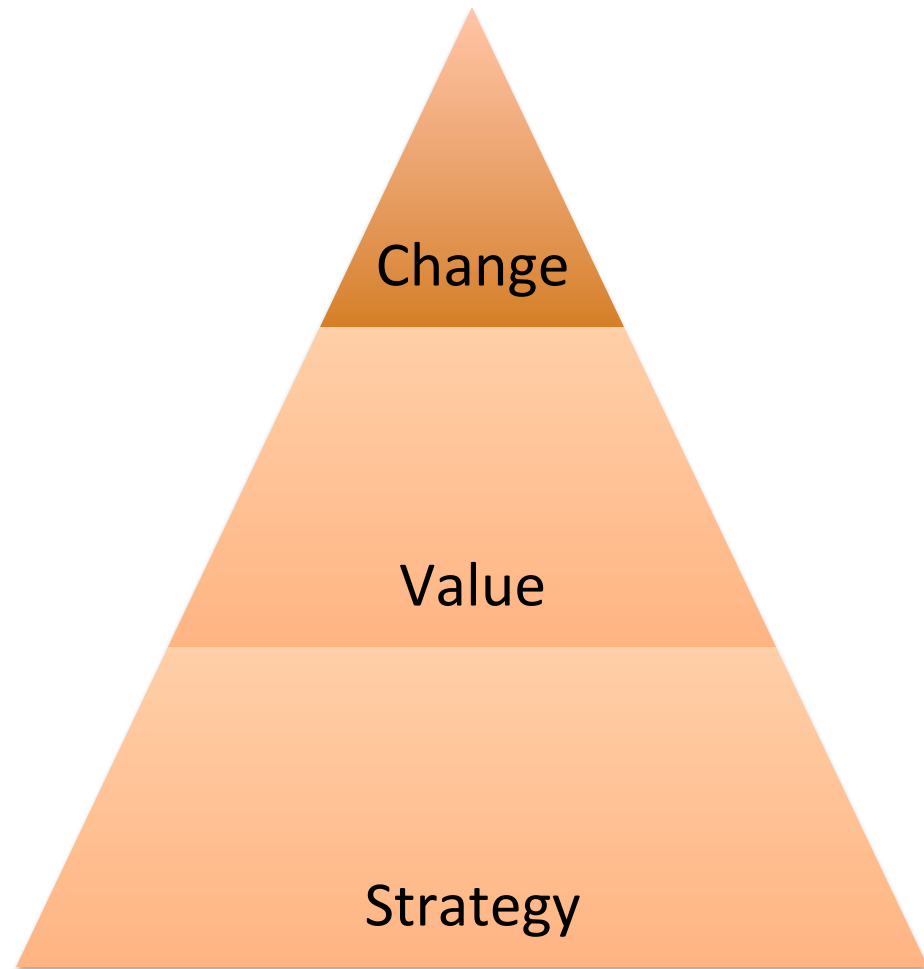
> A Second Assertion: Knowledge Services is what Specialist Librarians do – the same goals, objectives, and standards but now in the language of management.

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Knowledge Services: From Theory to Practice
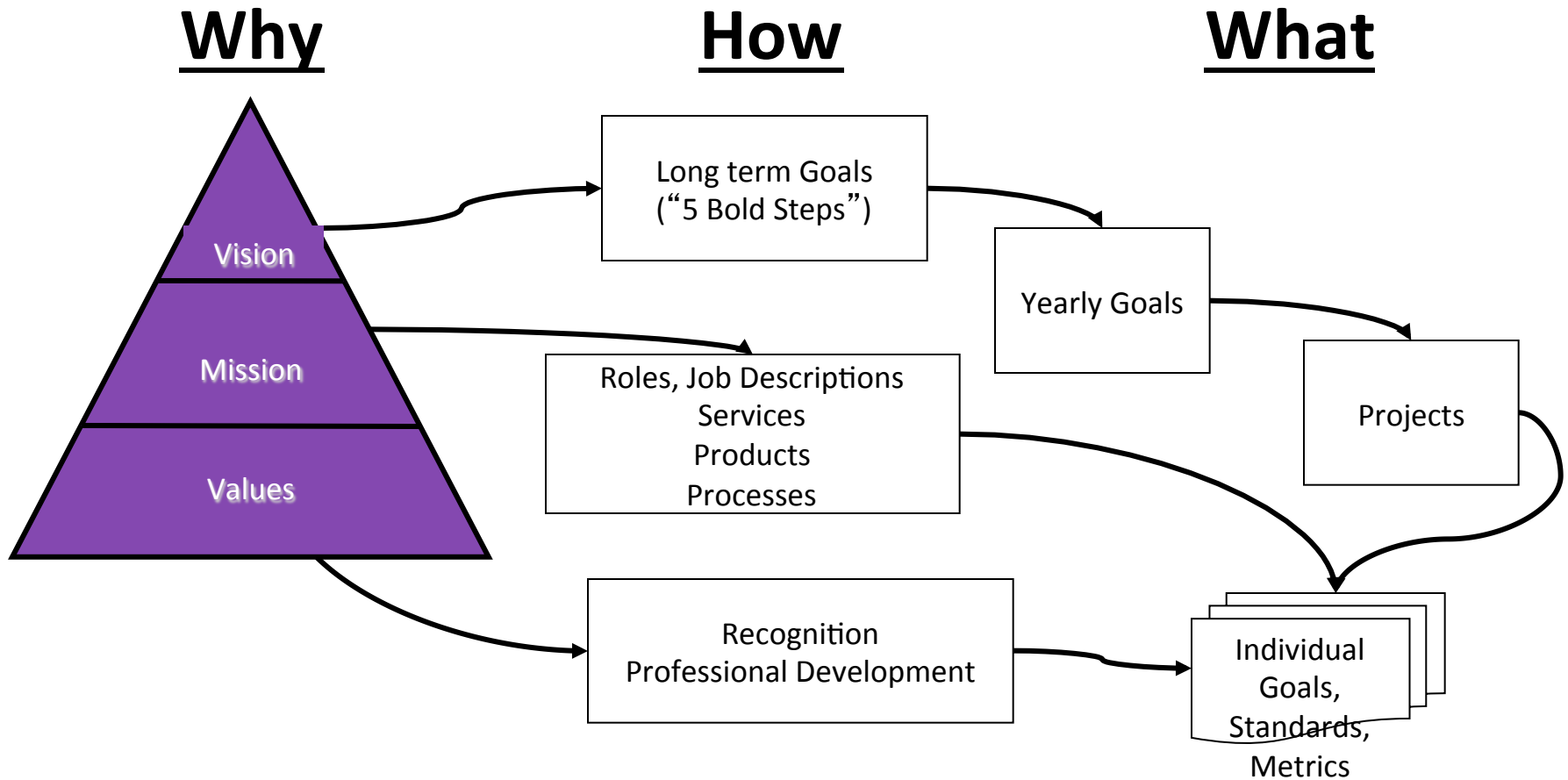
So how do we begin?

1. Develop a knowledge services strategy incorporating a master plan for the specialized library as the company's knowledge nexus
2. Establish service delivery value with key leaders and collaborators (conduct a knowledge audit and create an on-going measurement strategy for evaluating service delivery)
3. Figure out how to lead the change management process (it will be required)

Change

Value

Strategy

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Knowledge Services: From Theory to Practice

Why **How** **What**

Vision

Mission

Values

Long term Goals ("5 Bold Steps")

Yearly Goals

Roles, Job Descriptions
Services
Products
Processes

Projects

Recognition
Professional Development

Individual Goals, Standards, Metrics

The *Practice*:

Specialized Librarianship and Knowledge Services:

Measurement

"Letting Go"

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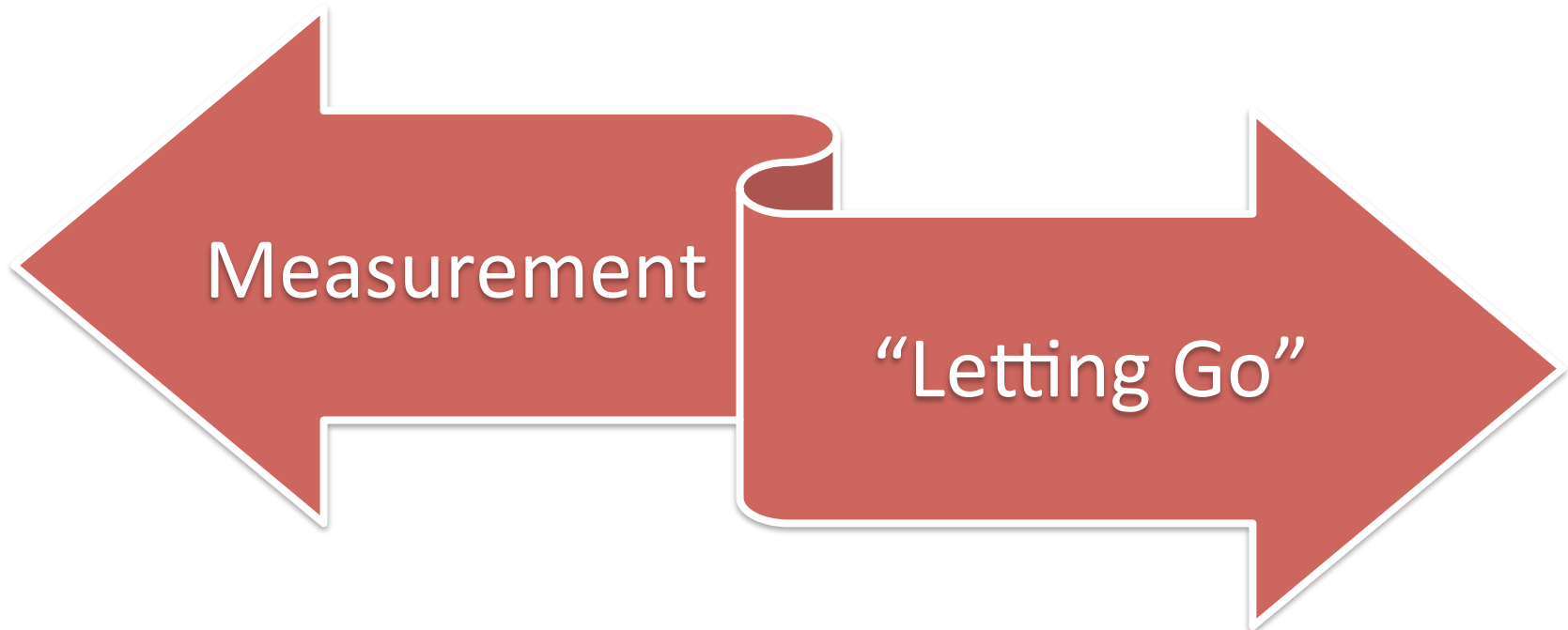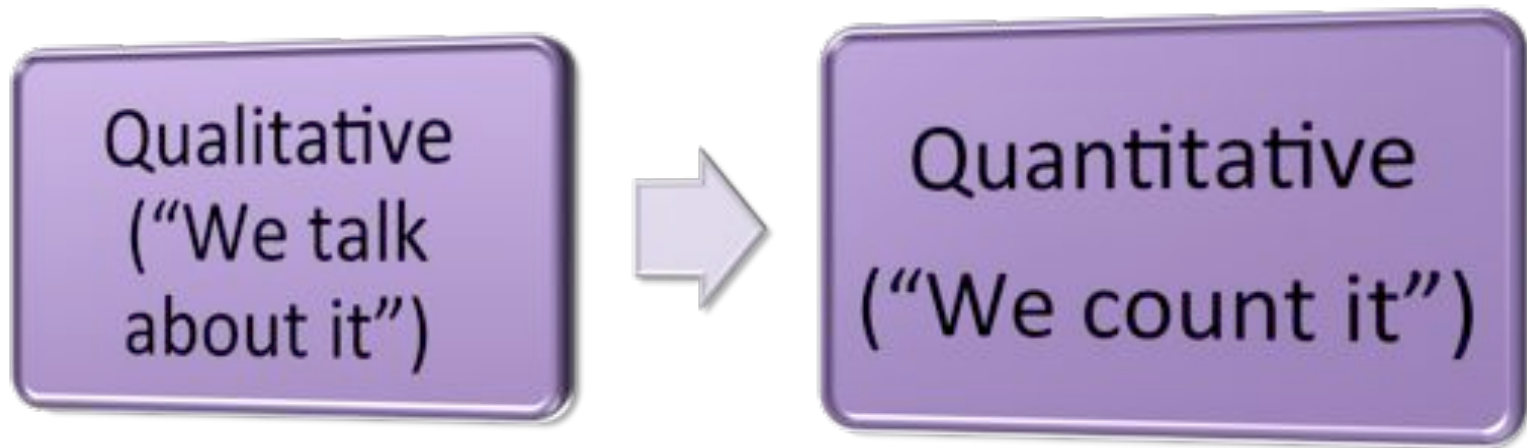
Knowledge Services: Connecting Strategic Learning with Information Management and KM

Our second talking point:

What quantitative measures replace (or coordinate with) "library-like" qualitative measures?

Qualitative ("We talk about it") → Quantitative ("We count it")

	Operational (Tactical/Measures Efficiency)	**Value** (Strategic/Measures Effectiveness)
Quantitative ("hard")	• Transaction counts • Use of resources • Time/$ saved looking for info (vs. time/$ saved by value of the content) • Benchmarking ratios • Input/output/process measures	• Time/$ saved using content provided or knowledge transferred (vs. time/$ saved looking for information) • ROI
Qualitative ("soft")	• Service level agreements • Service provision leading to partnership development with similar internal business units	• Impact • Anecdotal (Narrative) • Outcome measures

Knowledge Services: From Theory to Practice

Operational metrics quantify activities. They are useful to knowledge services, but are not of interest to executives.

– Use of purchased content, for vendor negotiations

– Use of various services, for staffing alignment and resourcing decisions

– Secondary indicator of usefulness of various services

Value metrics measure and reflect the *impact* of knowledge services. Executives can see what they are getting for their investment.

– Illustrate the impact of services or resources to the larger organization

– Explain the importance of each expenditure

– Show why knowledge services should be funded

Roger Strouse "Metrics for Knowledge Services"

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Exploiting the Qualitative ("Value Metrics"

Relevance

Maximizing the "So What?"

Testimonials

Anecdotes

Direct Cost Savings

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POLL

Polling Question # 2: In the library you manage, are your measures quantitative (you count things) or qualitative (you talk about things)?

- ❑ Quantitative   [16%]
- ❑ Qualitative   [8%]
- ❑ A mixture of both   [71%]
- ❑ Not sure   [5%]

[88% response]

Knowledge Services: From Theory to Practice

A final talking point:

How do I "conserve what works and abandon what doesn't" and at the same time meet the client's Knowledge Services needs?

Meeting User Needs

- Audit
- Recommend
- Strategize

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Knowledge Services: From Theory to Practice

Joseph Schumpeter
(1883-1950)
"Creative Destruction"

…the "process of industrial mutation that incessantly revolutionizes the economic structure from within, incessantly destroying the old one, incessantly creating a new one."

Maggie McGrath, "Joseph Schumpeter: The Original Advocate of Disruption." *Forbes, June 18, 2014*

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Knowledge Services: From Theory to Practice

"Conserve what works; abandon what doesn't"

Individuals and groups almost as a rule possess more knowledge than is often put to use. Continuous learning increases the yield of what is known. As a consequence, it is increasingly clear which methods are worth continuing and which should be dispatched.

Lee Igel
"Six Core Principles for Creating Strong Physician Leaders"

Stop Doing What Doesn't Work

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Making Choices

I was a mid-level associate, my mentor taught me a trick to manage career and business development frustration. She would hold her arm in the air with a fist, then exhale slowly while simultaneously opening her hand as if releasing something. "Let it go," she would say.

- Ari Kaplan
Motivational Leader/Author

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**Coming October 28, 2014**

TRANSFORMING LIBRARIES:

KNOWLEDGE SERVICES: BUILDING THE CASE FOR MANAGEMENT

Talking Points for October 28:

1. *Why does the organization where you are employed need knowledge services?*
2. *How do you establish <u>value</u> for knowledge services in the specialized library?*
3. *Who is the critical influencer positioned to support your goal to move your workplace from "just" a specialized library to a knowledge servics center?*

Perhaps of Interest
THE SLA/SMR INTERNATIONAL KM/KS CERTIFICATE PROGRAM

The Courses

- KMKS105 Change Management and Change Implementation in the
  Knowledge Domain
  (online October 14-29, 2014)
- KMKS103 Knowledge Strategy: Developing the Enterprise-Wide
  Knowledge Culture
  (online January 12-26 , 2015)
- KMKS104 Networking and Social Media: Technology-
  Enabled Knowledge Sharing (online February 9-25, 2015)
- KMKS106 Critical Success Factors: Measuring Knowledge Services
  (online April 6-22, 2015)
- KMKS101 Fundamentals of KM and Knowledge Services
  (SLA Annual Conference, Boston MA, June 12, 2015)
- KMKS102 The Knowledge Audit: Evaluating Intellectual Capital Use
  (SLA Annual Conference, Boston MA, June 13, 2015)

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

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![Soutron Global logo] **Cloud-based Library, Information, and KM/Knowledge Services Solutions**

Thank you

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