

Achieving Operational Excellence: Best Practices for Information Services

A Quantum² Seminar

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The Quantum² Leadership Circle

Strategic Competencies

- Environmental analysis
- Knowledge culture vision
- Perception analysis
- Relationship management
- Management buy-in

Business Competencies

- Needs assessment
- Service definition
- Marketing
- Performance
- Measurement



Trends & Challenges in Information

- Fit into several categories
 - Technology
 - Value Proposition
 - Content Evaluation & Deployment
 - Staffing Competencies
 - Stakeholder Buy-In and Service Definition
 - Marketing

Some Information Trends

- Knocking down of physical and organizational walls in global companies
- Flat budgets and staffing levels
- Alignment of information service with key organizational markets and critical initiatives
- It's all about Content! - *multiplicity, evaluation, deployment*
- Availability of information in users' digital workspace – The Virtual Library

Some Common Information Challenges

- Deal proactively with resources - *how to prioritize and do more with less*
- Improve internal image and effectiveness
- Market to and build relationships with clients
- Internal competition – *from other researchers, analysts, departments*
- Demonstrating analytical skills for added value
- Increasing skills portfolio for content deployment – web/intranet/portal development
- Understand the true information needs of the organization – *needs assessment, info mapping*
- Diversity of user requirements – *departmentally and globally*

What is a Best Practice?

Some definitions of **Best practice**:

- A working method, or set of working methods, which is officially accepted as being the best to use in a particular business or industry, usually described formally and in detail. Cambridge Advanced Learner's Dictionary, Cambridge University Press, 2003.
- The processes, practices, or systems identified in public and private organizations that performed exceptionally well and are widely recognized as improving an organization's performance and efficiency in specific areas.
geminfo.org/help/about/documentation/gem-controlled-vocabularies/vocabulary-resource-type
- A best practice is a technique or methodology that, based upon experience and research, has proven to reliably lead to a desired result.
www.pemcocorp.com
- An activity or procedure that has produced outstanding results in another situation and could be adapted to improve effectiveness, efficiency, ecology, and/or innovativeness in another situation.
www.ichnet.org/glossary.htm
- A concept referring to the best way of doing something, normally a function or process within an organization. Hence for example 'best practice organizations' - those who are at the forefront/ have the best procedures.
www.otte.vic.gov.au/publications/benchmark/resources/docs_what/what02_glossary.htm

A best practice is the best way of carrying out a function or process.

Why Adopt Best Practices?

- Improve work processes for organizational efficiency
- Maximize your current resources
- Explore new services or products
- Build stronger relationships across the organization
- Prove value

Potential Pitfalls

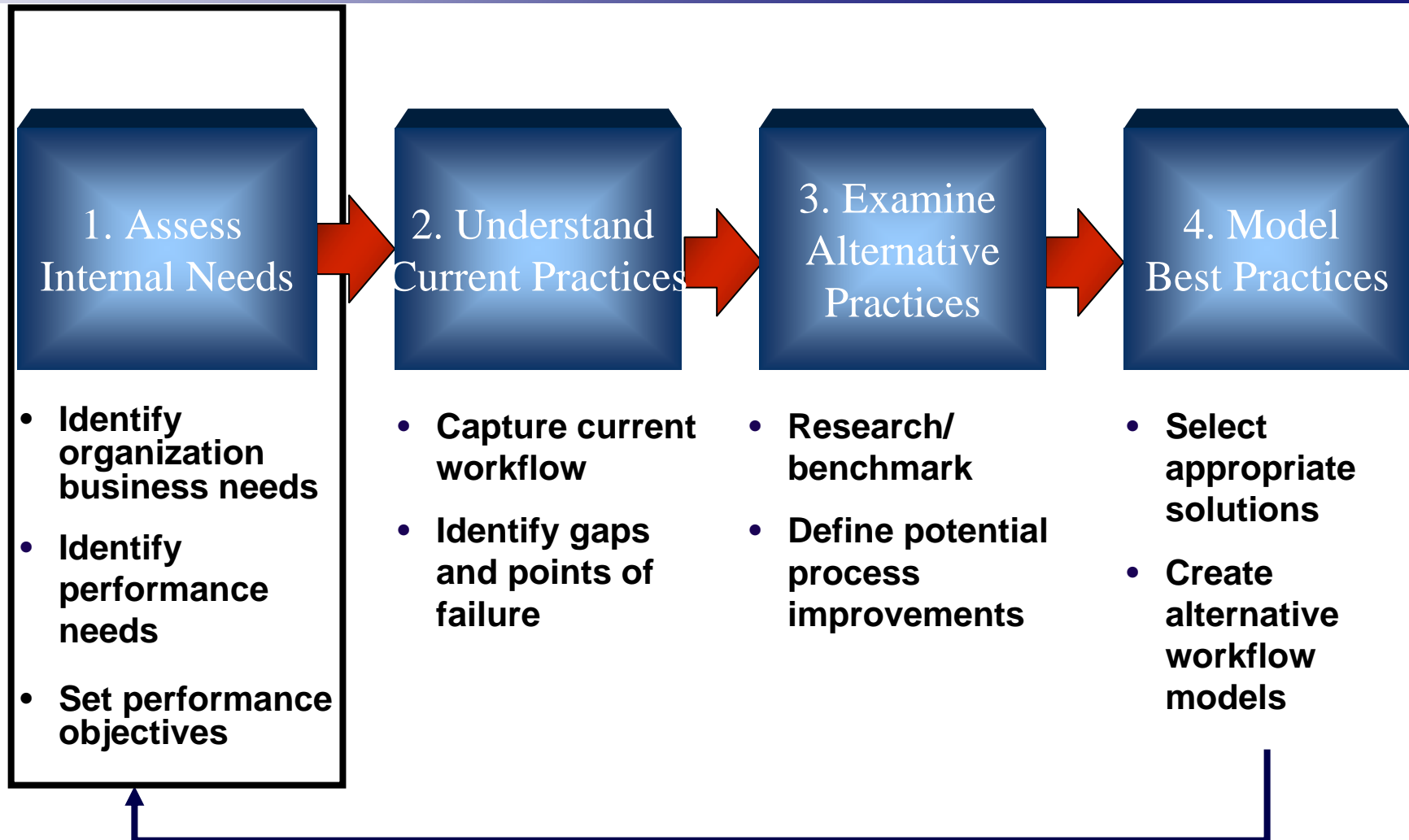
Internal Obstacles

- Hard to make tacit knowledge explicit
- Takes time to research and create
- Identification of critical business knowledge
- Takes effort to implement & gain acceptance

External Obstacles

- Cost of purchasing benchmarking reports
- Difficulty finding organizations to cooperate

Four Steps to Operational Excellence



Implement & Measure for Continuous Improvement

Step 1: Assess Internal Needs

- Who are your customers?
 - Senior management
 - Client users
 - Information Centre staff

Step 1: Assess Internal Needs

- **Activities of Business**
 - Coming up with new ideas
 - Improving implementation and processes

- **Identifying a Business Need**
 - Finding the gap between the status quo and identified business activities

Step 1: Assess Internal Needs

- How to Find Business Needs
 - Determine the goals, objectives, concerns, values, plans and problems of senior management
 - What are the key business objectives?
 - What trends are impacting your industry?
 - What technologies are being adopted within the organization?
 - What business processes are outdated or inefficient?
 - Clues can be gleaned
 - Sample information requests
 - Compelling business or financial events
 - Reading internal documents
 - Make the Information Centre visible and proactive
 - Get out of the library - “Walk the floors”
 - Keep communication channels open

Step 1: Assess Internal Needs

- Identify Performance Gaps or Needs
 - Outline the desired performance
 - What are you expected to perform, how and when?
 - Describe actual performance
 - Difference between the desired performance and actual performance is the “performance gap” or need
 - Conduct analysis to find out why there are performance needs
 - Select appropriate action(s) to improve performance
 - Eg appropriate solutions, information content, skills or training

Step 1. Assess Internal Needs

- Identify performance gaps or needs
 - Senior Management
 - How much money you receive and how you spend it
 - How you save money for the company and how much
 - How much time you save your clients that increases productivity
 - Clients
 - Availability and expertise of staff
 - Availability of information when they need it
 - How easy it is to obtain information
 - How long to fill a request

Step 1: Assess Internal Needs

Set Performance Objectives

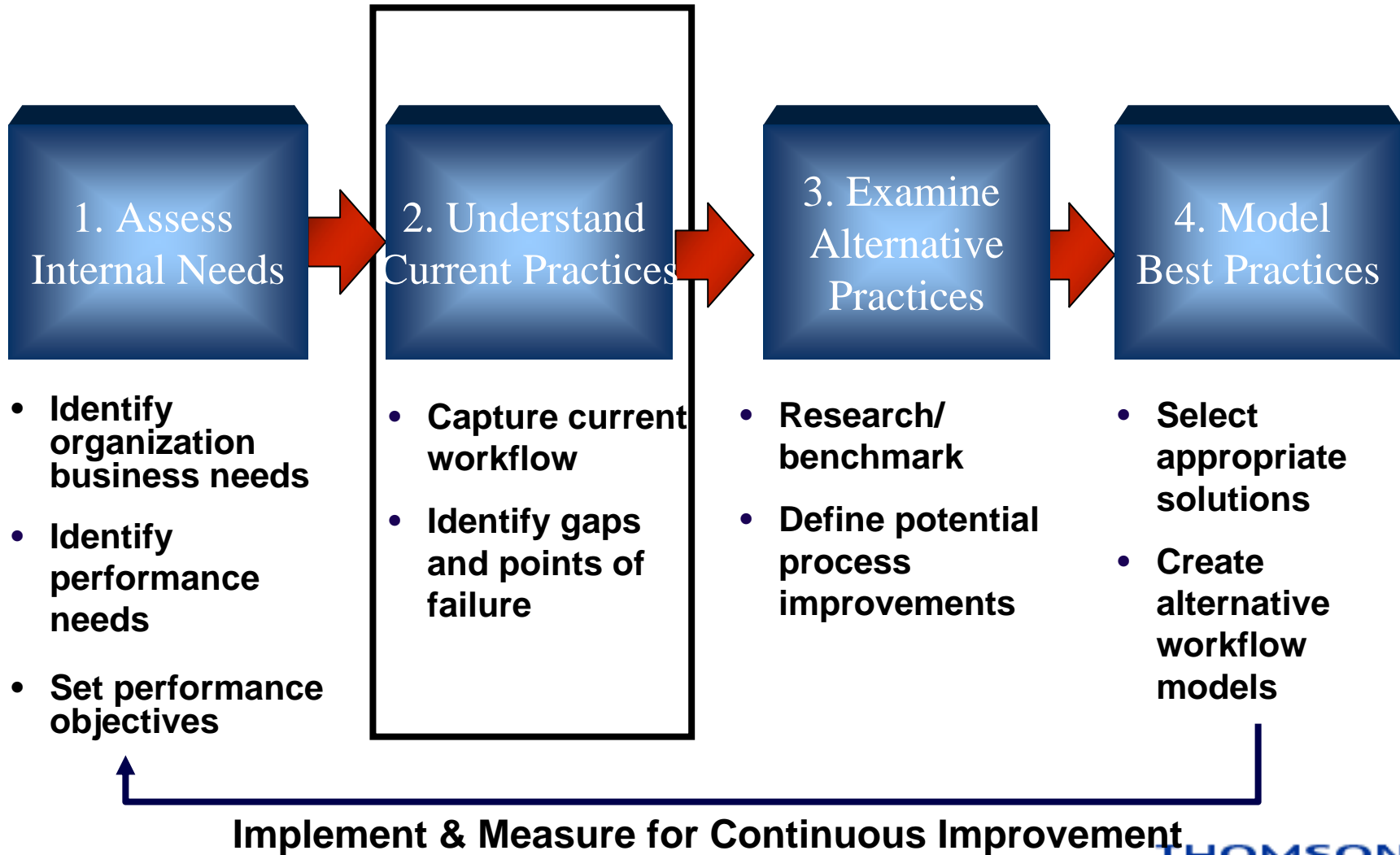
- How do customers see the information centre? (customer perspective)
- At what must the information centre excel? (internal perspective)
- Can the information centre continue to improve and create value? (innovation and learning perspective)
- How does the information centre look to stakeholders? (financial perspective)

Step 1: Assess Internal Needs

Set Performance Objectives

- What do users value?
 - Has this reshaped your thinking on content selection?
 - Have you discovered additional justifications to support your budget?
- Building a feedback loop: does your valuation of services match your clients?
- Are we doing things right? / Are we doing the right things?
- What is the minimum performance your users expect?
- What is the maximum?

Four Steps to Operational Excellence



Step 2: Understand Current Practices

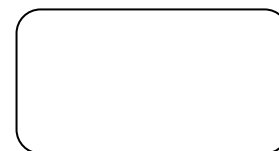
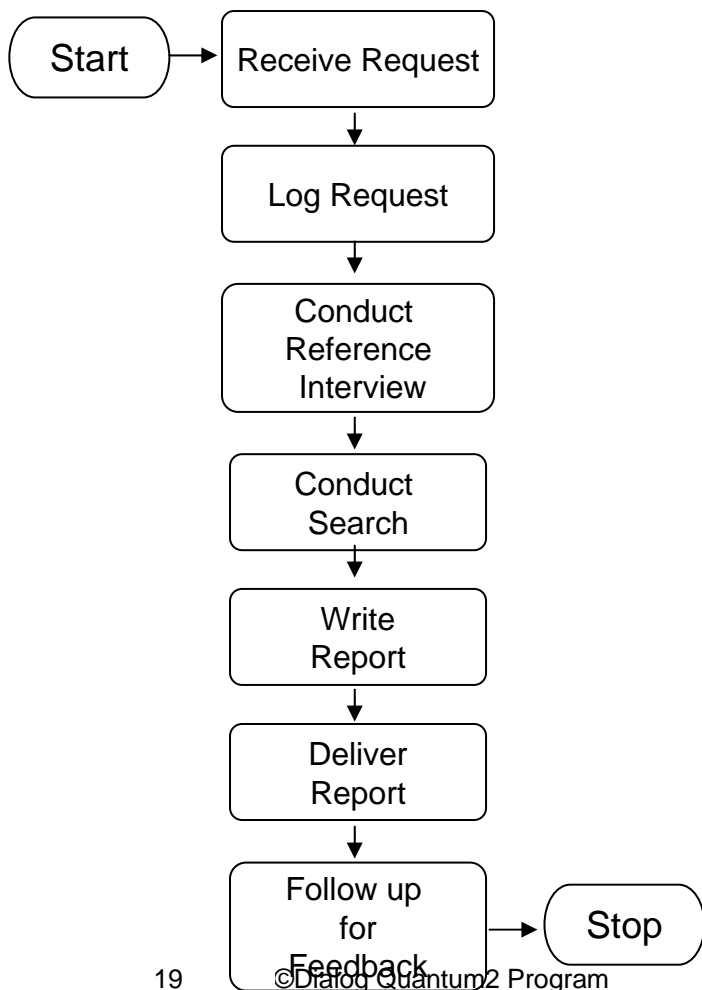
Current Work Process

Handling an information request

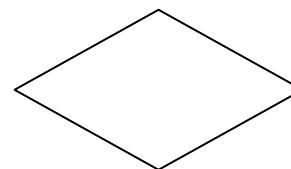
- Receive request for information
- Log request
- Conduct reference interview
- Conduct research
- Write up report
- Deliver to customer
- Follow up for feedback

Step 2: Understand Current Practices

Current Workflow Model Handling an information request



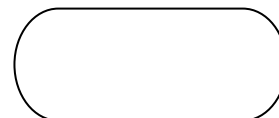
Activity



Decision



Direction



Start/Stop

Step 2: Understand Current Practices

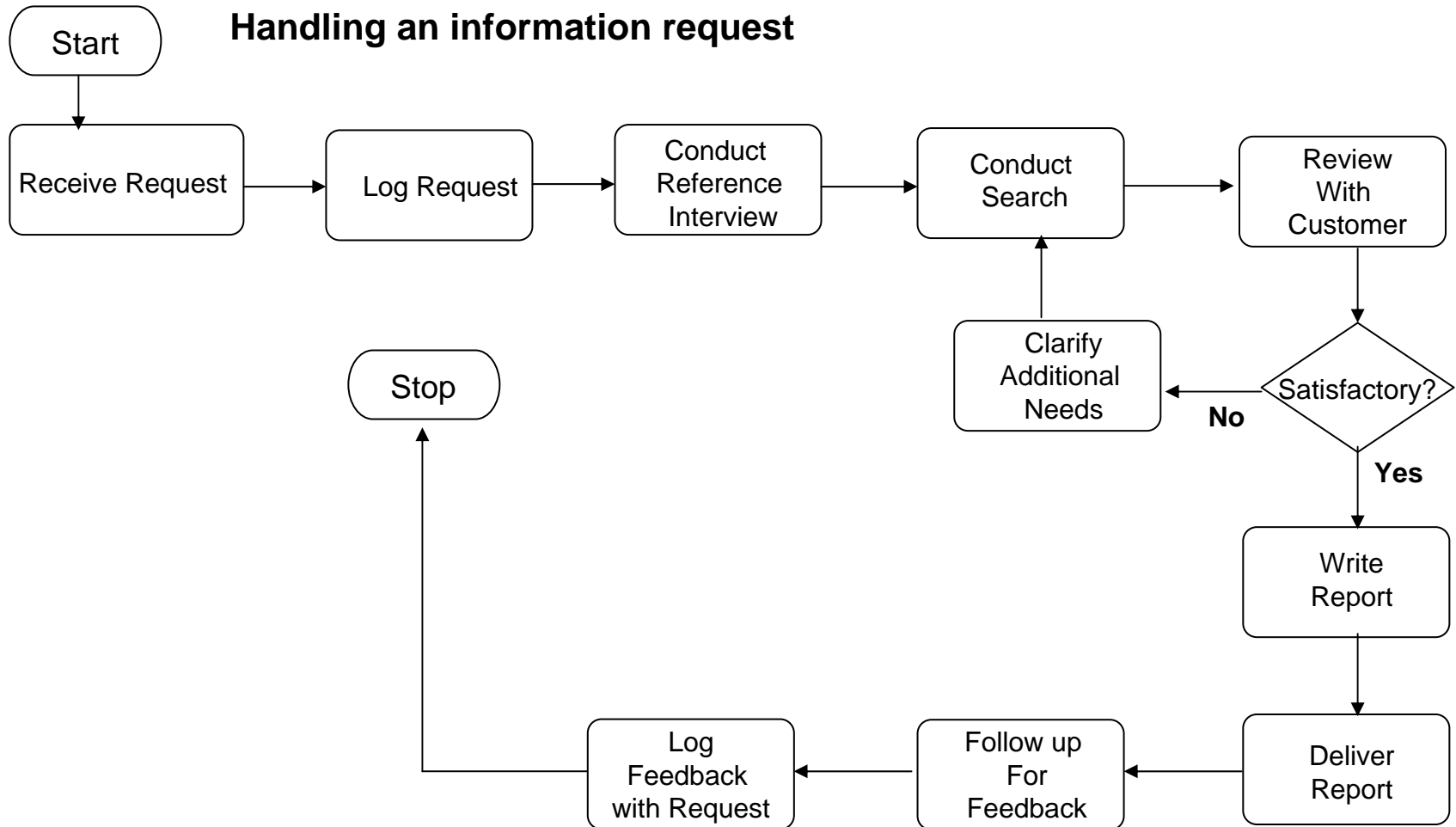
Current Work Process with Gap Analysis

Handling an information request

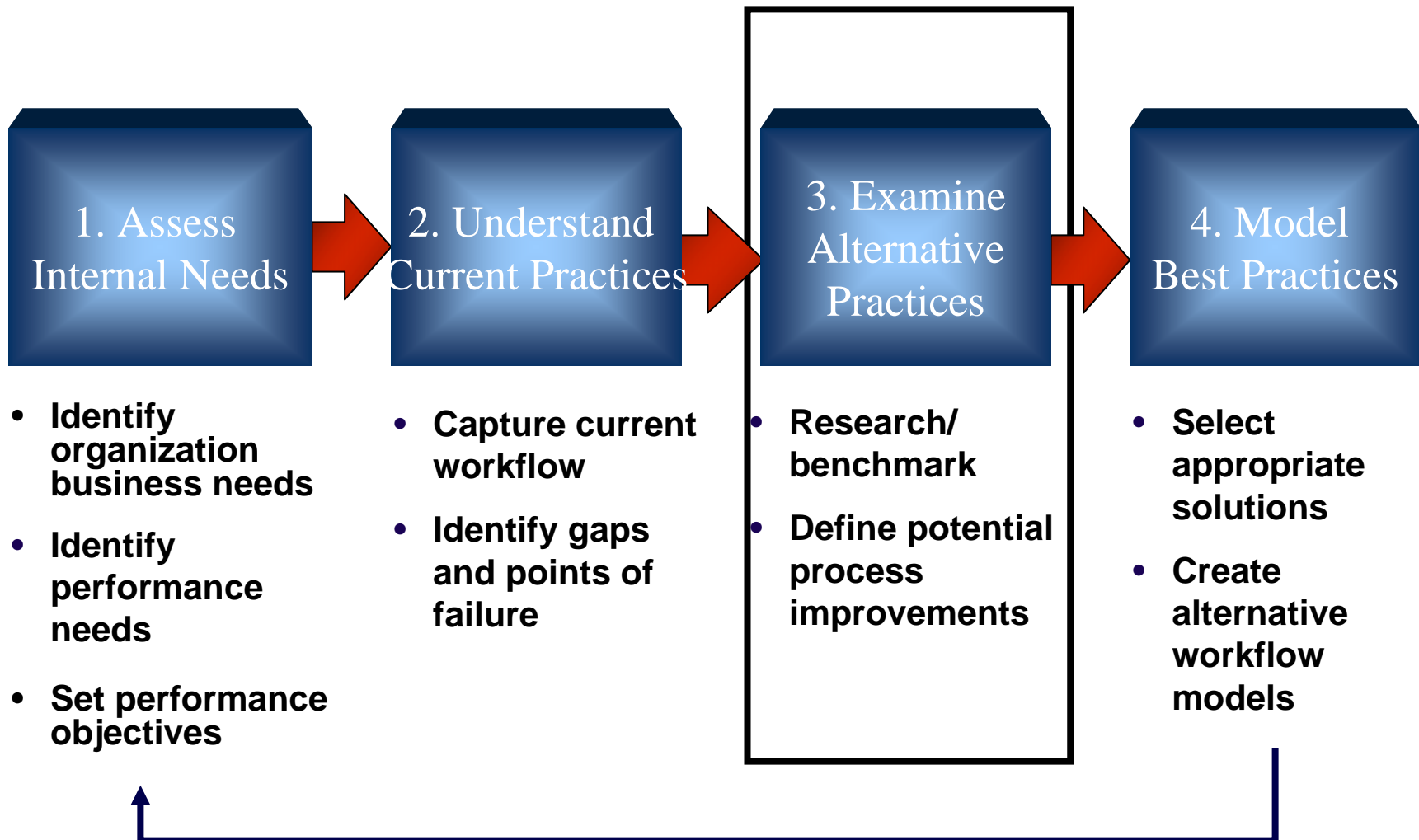
- Receive request for information
- Log request
- Conduct reference interview
- Conduct research
- Review with customer
- Satisfactory or Not Satisfactory
 - Clarify additional needs
 - Conduct research
 - Review with customer
 - Satisfactory
- Write up report
 - Include branding
- Deliver to customer
- Follow up for feedback
- Log feedback

Step 2: Understand Current Practices

Revised Workflow Model Handling an information request



Four Steps to Operational Excellence



Implement & Measure for Continuous Improvement

Step 3: Examine Alternative Practices

Benchmarking

- Involves measuring and comparing an existing process, product or service against that of recognised top performers...to identify best practices that lead to sustained performance Corrall, Sheila. 2000

- Can take several forms
 - Internal benchmarking
 - Bring together staff responsible for a major initiative with others in the organization to share information, ask advice and discuss lessons learned
 - External benchmarking
 - Research & learn from external, preferably world class, organizations

Step 3: Examine Alternative Practices

How to Get Started

- Informal methods
 - Rely on secondary information
 - Informal networking
- Formal methods
 - Engage a research firm
 - Purchase a report

Step 3: Examine Alternative Practices

- Do The Research
 - Competitive Analysis
 - What are other players doing with information?
 - What systems & processes have they implemented?
 - What information policies are in place?
 - Knowledge Sharing
 - Communities of practice
 - Leverage In/Leverage Out
 - Research & Re-Use
 - External Resources
 - Benchmarking reports
 - External consultants
 - Networking with peers in other companies

Step 3: Examine Alternative Practices

Discussion

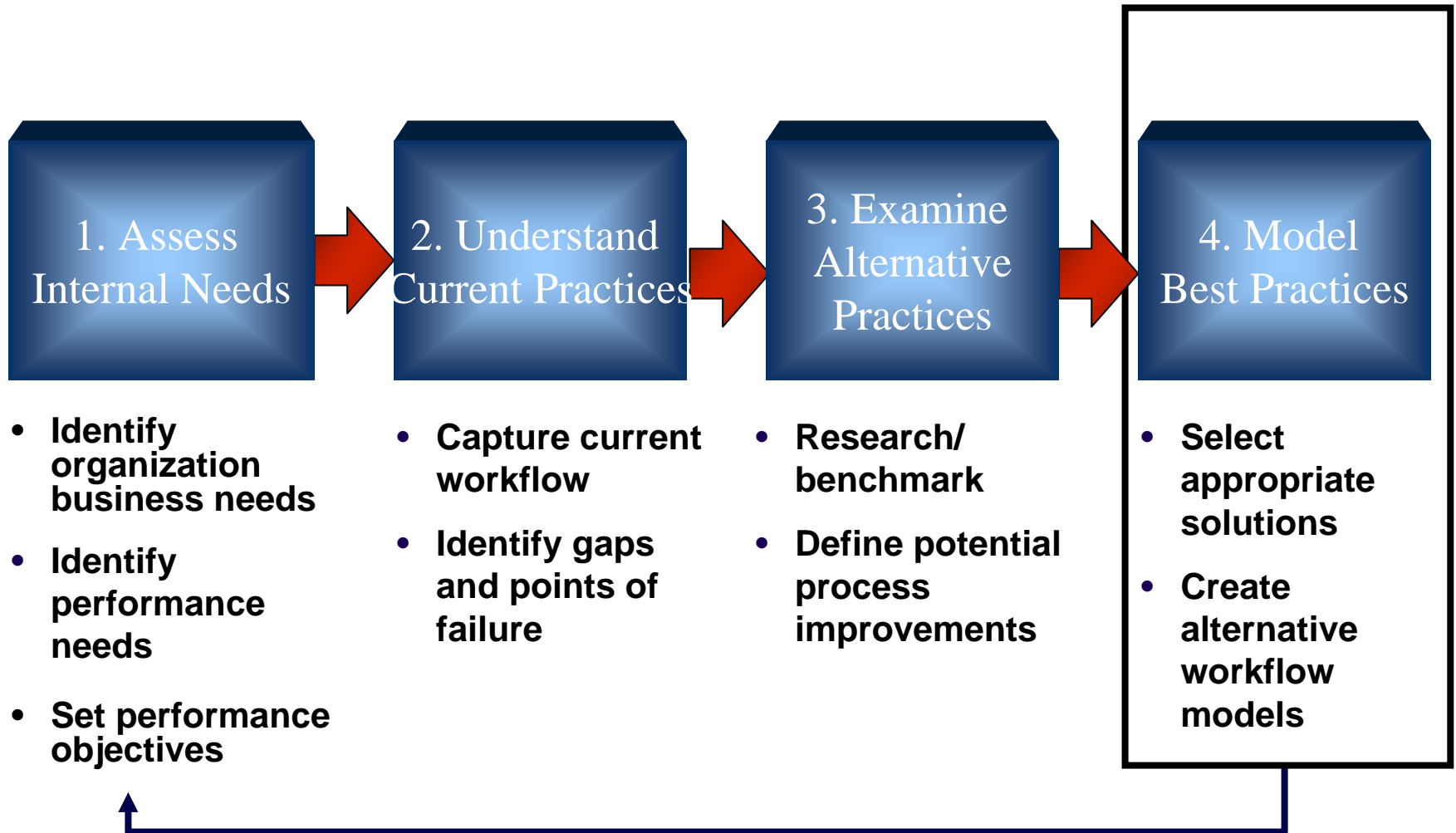
- How do you capture, transfer, reuse and track best practices?
- Have you done any benchmarking?
- What best practice activities have been tried in your organization already?
- What was successful? What failed? Why?

Step 3: Examine Alternative Practices

Define Potential Process Improvements

- Analyze best practices for your targeted process
- Note improvement possibilities for use in revised workflow

Four Steps to Operational Excellence



Implement & Measure for Continuous Improvement

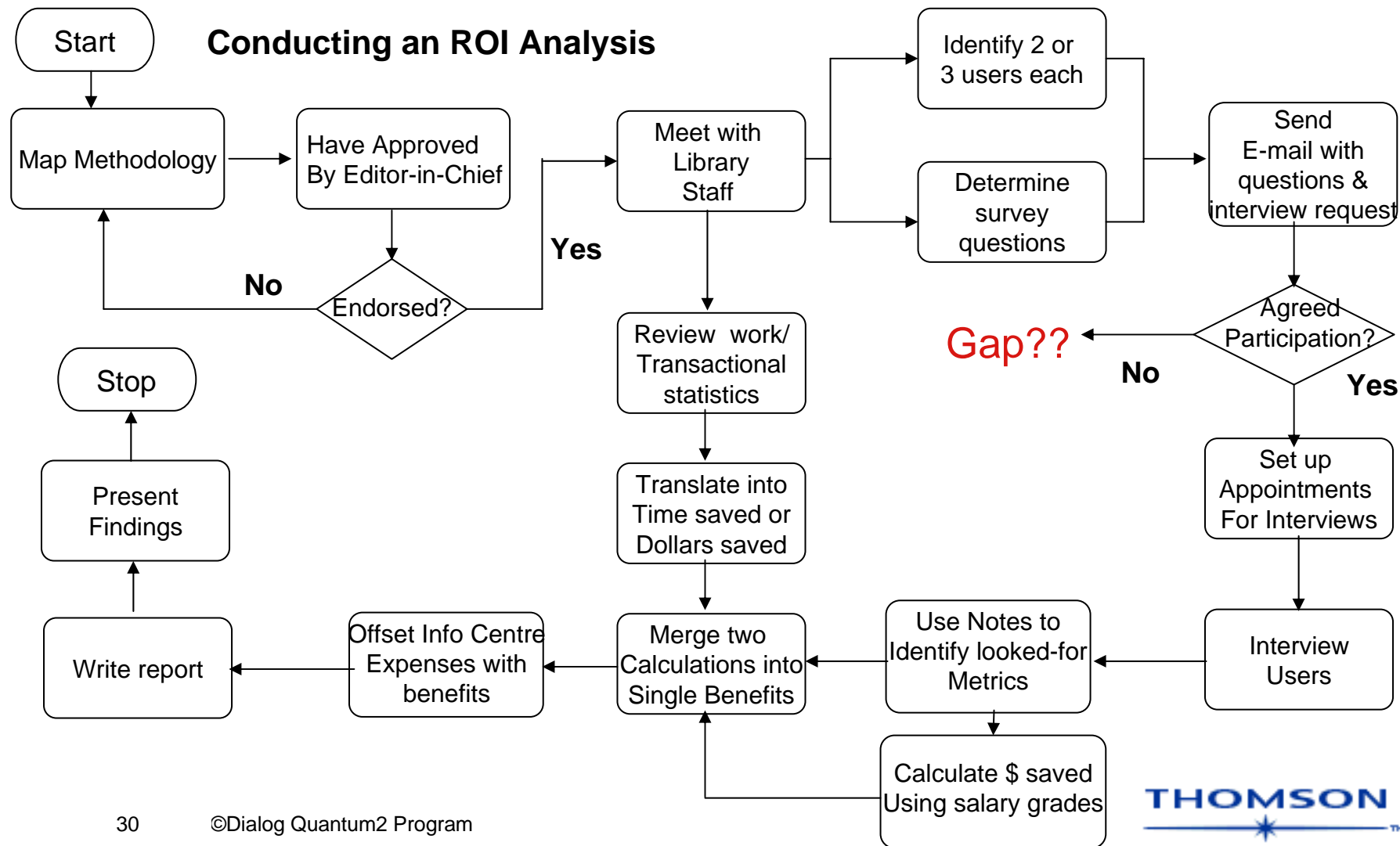
Step 4: Model Best Practices

Select Appropriate Solutions

- Assess through financial lens
 - Costs
- Connect to benefits
 - For Organization
 - For Clients
 - For Information Centre staff

Step 4: Model Best Practices

Create Alternative Workflow Models Conducting an ROI Analysis



Implement and Measure

- Top down
 - Senior management support
- Middle out
 - Initiate projects within the Information Center to model best practices for select processes
 - Communicate benefits to all level of customers
 - Opportunity for marketing
- Bottom up
 - Clients identify the knowledge they need
 - Clients identify performance levels
 - Clients participate in the process

- Identify and publicize examples of business results supported by the project
 - Improved access to information
 - Reduced project cycle time
 - Cost savings
- Opportunity to partner with corporate communications

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Thank You

- Any questions?
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