Transforming the dialogue with our customers: the evolution of our marketing plan

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CSIR Information Services
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Presentation Outline

- CSIR Information Services: a brief history
- Why marketing?
- Product training
- Embedded Services
- Web 2.0
- Patent Landscaping
- Conclusion
The CSIR

Demographics

- 2,411 members of staff
- 1,575 in SET base

- 300 Doctorates
  - 93 staff supported for doctoral studies

- 499 Master’s
  - 103 staff supported for Master’s studies

- 48.5% of SET base black (SA)
- 32% of SET base female (SA)
R&D Activities

Emerging research areas (ERAs)
- Nanoscience
- Synthetic biology
- Mobile intelligent autonomous systems

Operating Units conducting R&D
- CSIR Biosciences
- CSIR Built Environment
- CSIR Defence, Peace, Safety and Security
- CSIR Materials Science and Manufacturing
- CSIR Modelling and Digital Science
- CSIR Natural Resources and the Environment

National Research Centres
- CSIR National Laser Centre
- CSIR Satellite Applications Centre
- Meraka Institute

CSIR Consulting and Analytical Services

www.csir.co.za
CSIRIS Mission

To match the organisation’s information and knowledge management needs with international practices, trends and resources

- Providing relevant services
- Identifying value-adding opportunities and realising them
- Facilitating access to appropriate resources, tools and technologies
- Building strategic relationships and partnerships for collaboration
- Effecting sustainability by implementing sound funding models and
- Ensuring that we have adequate, competent staff
CSIR Information Services (CSIRIS)

- eResources & Library Services
- Information Specialist Services
- Records & Archival Services
- Knowledge Management Services
Why Marketing?

- Evolving technology
- Client perceptions of technology
- Impact of new ways of providing information
“Trends impacting library permanence”

- Ebooks, Apps, Content Change
- Funding Issues and Perceptions
- Retail Expectations
- Technology Divide
- Service Expectations
“Customer service is defined as an organizations’ ability to consistently meet the needs and expectations of its customers. According to the marketing concept, an organization must determine what customers want and use this information to create satisfying products and services.” (Miao and Bassham, 2006)
Information Audit & User Needs Study
**Information Audit – Focus**

- What are the goals of the Research Group? How do these goals align with those of the CSIR?
- What are the various objectives assigned to each section in the Research Group?
- Tasks/activities/processes associated with each of the objectives

<table>
<thead>
<tr>
<th>1. Task, Activity, Process</th>
<th>2. Info required</th>
<th>3. Current products, services</th>
<th>4. % satisfaction of info requirements</th>
<th>5. Provided by:</th>
<th>6. Used by: (Number per category)</th>
<th>7. Importance (Scale of 1 to 5, 5=most important)</th>
<th>8. What other products, services should CSIR offer?</th>
<th>9. Used by: (Number per category)</th>
<th>10. Importance (Scale of 1 to 5, 5=most important)</th>
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Marketing Goals & Objectives (1)

- Ensure a return on investment in e-resources through appropriate user training events
- Ensure all resources and services offered are in line with the CSIR vision and mission....that it is user focused and users’ have confidence in our ability to support their requirements
- Improve information literacy
Marketing Goals & Objectives (2)

- Provide guidance on publishing models, publishing criteria for publication in journals, and selection of appropriate journals for publication
- Improve the knowledge and competence of the Information Specialists through the attendance of appropriate training events and conferences
- Organise and present information and promotional sessions during National Library Week and International Open Access Week
Evolution of our Marketing Plan

With the goals and objectives clearly defined, CSIRIS’s marketing strategy began to take shape. CSIRIS was now better equipped to address the needs of researchers’ through the subscription of appropriate products and the development of user focused services.
Goals of Training

- To provide the user with search techniques and a knowledge of the most appropriate database to use when commencing a literature study
- Market the value of subscription products to ensure a return on investment
- Instil in researchers’ a confidence in the Information Specialists’ ability to deliver a value added service
Customised training sessions:

- Unit/Group level sessions
- Individual sessions
Product Training (2)
In Addition to Training

- “How To…” manuals
- “All About…” series of information sharing presentations
- WINK: Electronic tutorial
Evaluation

- Evaluation of training events are measured by a client satisfaction survey which attendees must complete.
- Goal is to keep client satisfaction above 90%.
# Training evaluation form

**CLIENT SATISFACTION SURVEY FOR 1-TO-1 TRAINING SESSION**

<table>
<thead>
<tr>
<th>Attributes of Training</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly disagree</th>
<th>N/A</th>
<th>If not &quot;Strongly agree&quot;, what more could Info Specialist have done?</th>
</tr>
</thead>
<tbody>
<tr>
<td>The training was provided in a friendly, approachable and professional manner</td>
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<td>The training was done by the agreed deadline</td>
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<td>The extent of the Information Specialist's knowledge on the training topic is excellent (X2 weighting)</td>
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<td>The content of the training session met your requirements (X2 weighting)</td>
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<tr>
<td>After the training you received, you feel confident in doing what you were taught (2X weighting)</td>
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</table>

What was the topic(s) of the training session you received?

Do you think you will need a refresher for the training you received, in the future?

Do you require training on any other CSIRIS products?

Any other comments / complaints / compliments / improvements required:

PLEASE COMPLETE THIS FORM AFTER YOUR TRAINING SESSION WITH YOUR INFO SPECIALIST AND MAIL TO MADELEIN VAN HEERDEN, CSIRIS, BUILDING 22
Personalising customer service
“Embedded librarianship is a distinctive innovation that moves the librarian out of libraries and creates a new model of library and information work. It emphasizes the importance of forming a strong working relationship between the librarian and a group or team of people who need the librarians’ information expertise”. (Shumaker, 2012)
Embedded Services Aims

- Relationship building
- Personalisation of services
- Attract non-users of CSIRIS
- Point of need assistance
CSIR Research Cycle

- Research Impact Area reference systems: Tools: Wikis, Blog... background landscaping & consolidated lists for contacts, conferences, literature, etc

- Literature review & indexing
  - Identification of collaborators
  - Identification of funding sources
  - Templates for writing proposals, reports, etc

- Project management
  - IP management

- Prior art services / databases

- Evaluation & introduction of online referencing tool

- Project closure
  - Dissemination & artifacts
  - Real-time communication

- Records management, digitization & preservation
  - Repositories: Research Space & TDoB

- Services via mobile & Social media

- Personalisation

- Technology roadmaps
  - Patent landscaping

- VRE development and content identification

- Data management practices and value addition to data sets
A patent landscaping study is a comprehensive search of the past and present patent activities of competitors in a specific technology or field of research. It is a pivotal tool in gaining deep insights, planning future research and developing commercialisation strategies.
Major Players in Appetite Suppressants and Obesity Management

- AstraZeneca AB: 11%
- AstraZeneca UK LTD: 8%
- Bayer AG: 7%
- Genentech Inc: 8%
- Hoffmann La Roche: 8%
- Lilly Co ELI: 14%
- Merck & Co Inc: 17%
- Novo Nordisk AS: 12%
- Pfizer: 8%
- SmithKline Beecham Corp: 7%
- AstraZeneca UK LTD: 8%
- Bayer AG: 7%
- Genentech Inc: 8%
- Hoffmann-La-Roche: 8%
- Lilly Co ELI: 14%
Top Priority Countries Patenting in Appetite Suppressants and Obesity Management

- US: 50%
- JP: 19%
- IN: 1%
- KR: 6%
- GB: 6%
- FR: 3%
- EP: 7%
- CN: 3%
- DE: 3%
- DK: 2%
- CN: 3%
A patent landscaping article was published on the CSIR Intraweb

CSIRIS upgraded the Q-pat user licence to allow access to more superior analysing tools which enabled CSIRIS to offer a new value-added patent landscaping service to the organisation

The Information Specialists proactively advertised CSIRIS’ new patent landscaping service
Embedded Services Activities

- Attend Research Group monthly meetings
- Regular client meetings to discuss existing services, information needs and training requirements
- Attend presentations and conferences relating to researchers’ work
Embedded Services Outcomes

- Provision of customer focused, value added service
- Opportunity for new services development
- Increase CSIRIS’ profile within the organisation
Web 2.0

CSIRIS investigated and implemented the following social media to enhance service provision

- Wikis
- Blogs
- RSS
- Social networking sites - Yammer
Background information

Useful Links on Technology Roadmaps

- Renewable Energy Technology Roadmap Up to 2020 (European Renewable Energy Council)
- Renewable Energy Technology Roadmap 20% by 2020
- Energy Technology Roadmaps: Status Report (International Energy Agency)
- Large-Scale Solar Electricity for a Sustainable Energy Future: The IEA Roadmaps on PV and CSP
- Environment & Energy Technology Roadmap and Diffusion Scenario
- Technology Roadmap Wind Energy (International Energy Agency)
- Renewable Energy Technology Roadmap (Technology Innovation Office)
- Strategic Technology Roadmap in Energy Field - Energy Technology Vision 2100
- Strategic Technology Roadmap (Energy Sector) - Energy Technology Vision 2100
- Technology roadmaps 2010-2050
- A Technology Roadmap on Low Carbon Technologies (Commission of the European Communities)
- Energy Technology Roadmap for the Next 10 Years - The case of Korea
- Cleaner Power in India: Towards a Clean-Coal-Technology Roadmap
- Clean Energy Technology Roadmap (Office of Energy Security; Minnesota Department of Commerce)
- Canada’s Wind Technology Roadmap (Natural Resources Canada)
- Challenges and Successes in Technology Roadmap Implementation
- Hydrogen Technology Roadmap (Australian Government, Department of Resources, Energy and Tourism)
- Australian Hydrogen Activity 2008 (Australian Government, Department of Resources, Energy and Tourism)
- Intersolar Update: PV Technology Roadmap Efforts Receive Enthusiastic Support
Blog: Purpose

- Subject blogs serve as a current awareness service
- An information overload prevention strategy
- Provides the opportunity to use interactive web technology for communication, collaboration and marketing
- Communicate:
  - the latest and most relevant information to researchers
  - journal content pages and relevant CSIRIS updates
- Increase CSIRIS visibility and showcase the Information Specialists professional expertise
Lowdown on Fracking in the Karoo

by Louisa on SEPTEMBER 17, 2013 in WATER RESOURCES

Fracking is a method that was first used in America in 1949, to ‘stimulate’ oil wells that were close to being depleted. But the fracking being done now is very different to what was done then. In the 1990s, a new method was been pioneered and is technically known as horizontal slickwater hydraulic fracturing. II [...] 

READ FULL STORY • COMMENTS { 0 }

Wetland Management and Sustainable Livelihoods in Africa

by Louisa on SEPTEMBER 17, 2013 in NEW BOOKS

In this book the authors argue for a paradigm shift in the way African wetlands are considered. Current policies and wetland management are too frequently underpinned by a perspective that views agriculture simply as a threat and disregards its important contribution to livelihoods. In rural areas where people are entrenched in poverty, wetlands (in particular [...]
Yammer is a social network service used for private communication within organizations and is an example of enterprise social software.
Johan van Zyl (Principal Researcher/Developer) has joined the csir.co.za network. Take a moment to welcome Johan.

Coral Featherstone: Hello there 😊

Laurie Butgereit to All Company

Before you rush out and get a new iPhone with the fingerprint security, you might want to read this article. Although most countries have legal provision where people cannot incriminate themselves (and therefore cannot be forced to supply passwords and PINs), there is legal precedent for forcing people to supply blood samples, DNA samples, and fingerprint. This is a rather interesting article:

http://www.wired.com/insights/elsewhere/apples-fingerprint-i...
Going Forward

Energy
Natural environment
Industry
Built environment
Defence & security
Health

CSIR Mandate

www.csir.co.za
Customer orientation requires that Information Specialists be proactive and focus on relationship building activities as this is the key to identifying and developing new services that will support research and be of value to the researcher. Therefore knowing who our customers are and what their information needs are, is vital.
“The innovative library refers to one that is engaged in innovation of its own accord to adapt to the more and more complicated environment and demand changes. Its’ most fundamental features include its’ brave willingness to accept and actively adapt to changes, its’ putting user demand at its core and its high flexibility, openness and foresight”. (Guo Jing & Chen Jin, 2009)
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