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Libraries in Dialogue for Transformation and Innovation

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

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ABSTRACT

It is well accepted that customer focused marketing and innovation are the two most important aspects of business, especially in the age of the ever-increasing usage of the Internet. According to Peter Drucker, marketing must encompass the whole business and must ultimately be seen from the point of view of its final result, which is the customer’s point of view. In his view innovation is a process that transforms ideas into new and improved products or services. For libraries, this implies constant change, which should be focused on “smarter” not “bigger” services. (Drucker and Maciariello, 2008)

Like many other libraries, CSIR Information Services (CSIRIS) is confronted with an ever changing digital landscape. The impact of evolving technologies, evolving products, client perceptions and expectations of these technologies as well as new ways of information provision have required that the information services offered to CSIR researchers had to transform. It became necessary to adapt and embrace these changes in order to provide a high standard of customer service, remain relevant and be regarded as a valuable resource within the organization.

As library services at the CSIR became more virtual and the physical library no longer central to service delivery, CSIRIS had to review its existing marketing plan in order to develop a strategy that is focused on the customers’ changing information needs. The assumption, according to Parker et al. (2007), is that “customers are looking for an offering that best fits their needs and therefore the organization must define those needs, and develop appropriate offerings.” Such offerings however must be in line with current trends. This paper therefore looks at how CSIRIS staff adapted to the changing digital landscape and transformed their marketing strategy to ensure that their clients were attaining maximum benefit from new digital services and electronic resources. It considers how the Information Specialists’ understanding of customer focused, value added information services had to evolve in order to stay relevant within the organisation.

The paper will focus on the way in which the following initiatives were used to enable dialogue:

- Embedded services – Information Specialists aligning themselves with the work researchers are doing to ensure relationship building between Information Specialist and client.
- Developing high expertise services such as patent landscape studies – A patent landscape study is used as a pivotal tool in gaining deep insights, planning future
research and developing commercialisation strategies and the Information Specialist is a peer performer in that process.

- The monitoring of new products on the market – Investing time and providing exposure to such products to enhance service delivery.
- The effective training of clients to ensure a positive return on investment.
- The active use of Web 2.0 technologies (blogs and wikis) to aid our efforts to improve dialogue with the customer, and
- The use of electronic tutorials to ensure that we reach individual clients.

These activities form the backbone of our current marketing strategy which continues to evolve.

INTRODUCTION

Libraries are at an exciting crossroad and the opportunities to enhance service delivery are endless. Over the past two decades librarians have experienced a number of changes in how information is stored, organized, retrieved and transmitted. Globally, technological innovations are occurring at a breathtaking speed and libraries cannot choose another option but to be shaped and transformed by these new and exciting developments. Phrases and terms such as digital library, electronic services, e-research, virtual space, Web 2.0 are being used to define the current library environment. In this electronic environment, information sources are web based and customers can help themselves online – without librarian intervention. The physical space of the library appears to have become irrelevant and no longer seen as essential for service delivery. It just does not matter where users are located anymore. The perception is that business can continue as usual. We, at the CSIR, believe that if such a situation is merely accepted, both the clients and the librarians would have less than both parties deserve. We believe that these are exciting times and that if we talk to our end users and look for collaboration opportunities the CSIR will benefit extensively.

Dialogue with the customer, to ultimately meet and exceed customer service expectations has therefore become a focal point in our strategy to market our services. The virtual user has arrived and therefore the focus of service provision has shifted. The impact of new technologies forces us into new ways of working. The electronic information environment opened up a new avenue of information provision and with this came the challenge of reaching the virtual user and addressing his needs. Other challenges include providing the necessary information resources for users, having to learn and embrace new technologies to enable and educate users in information literacy and designing suitable marketing and training programs to teach and promote the use of these products. Most importantly, librarians had to find new ways to market the library and its services to ensure a return on investment in their resources. As departments that must always justify their existence, libraries need to continuously reinvent their roles to keep pace with external change.

In order to meet these challenges, librarians must know and understand their customers and identify what their needs are and provide for them. According to (Miao & Bassham, 2006), “customer service is defined as an organization’s ability to consistently meet the needs and
expectations of its customers. In the corporate world, the emphasis on customer service has been described as a marketing concept of business management. When an organization has adopted the marketing concept, it “moves from a product orientation to a customer orientation. The foundation of the marketing concept is a business philosophy that leaves no doubt in the mind of every employee that customer satisfaction is of primary importance. All energies are directed toward satisfying the customer” (Kaliski, 2001). According to the marketing concept, an organization must determine what customers want and use this information to create satisfying products and services. Providing excellent customer service entails making every effort to satisfy the customers’ requests.”

**WHY MARKETING?**

In 2005, CSIRIS undertook an information audit and user needs study throughout the CSIR, the purpose of which was to:

- Gain a better understanding of how information was used and by whom
- Identify services and resources required as well as users’ preferences
- Identify gaps and duplication with regard to information resources

With the permission and assistance of the various Unit Managers, meetings were scheduled with both users and non-users of CSIRIS. A total of 296 researchers participated in the study, most of who were at a senior level. The first part of the study focused on an audit of information resource requirements per research group. The second part of the study was an open discussion where the researchers were encouraged to discuss problems and frustrations experienced as well as any specific requirements. The third part of the study was a questionnaire that formed part of the information mapping exercise, which enabled CSIRIS to advise the organization on the changing information requirements of CSIR researchers.

The questionnaire included questions such as:

- The amount of time spend on gathering information
- Who did researchers approach when they required information, e.g. the Unit Information Specialist, the Internet or people / resources outside the CSIR
- Which of the information services did they utilise the most
- What information needs were not provided by CSIRIS at the time
- “Wish list” of information resources that were not available through the CSIRIS at the time

The results of the audit were used to determine all additional resources that should be made available to the researchers. The audit enabled CSIRIS to develop a strategic plan to achieve the new goals identified and create new values for CSIRIS and the organization. The customers benefitted from the new customer-focused activities and CSIRIS could begin planning long-term marketing projects and services. The purpose of marketing and promoting CSIRIS products and services is to deliver on what is stated in the CSIRIS mission statement:
• To add value through personalised information services
• Provide an environment conducive to effective collaborative knowledge creation and sharing
• Create and continuously improve information management systems and strategies
• Identify and make accessible bibliometric tools to monitor and measure CSIR’s research impact
• Preserve and curate information and data sets, and to
• Increase the visibility of CSIR research outputs globally

Marketing would therefore:

• Ensure a return on the investment in e-resources through appropriate user training events
• Ensure that all library resources and services offered are in line with the CSIR vision and mission, that it is user focused and that users have confidence in our ability to support their requirements

Furthermore, it was necessary to have a proper marketing strategy in place which would clearly define the marketing goals and objectives.

The goals were to:

• Improve information literacy of users by offering relevant training
• Ensure library resources and services were user focused
• Improve researchers’ confidence in CSIRIS’ ability to support their information requirements
• Support national and international library drives

Specific objectives were to:

• Provide guidance on publishing models, publishing criteria for publication in journals, and selection of appropriate journals to publish in. (To achieve this, specific opportunities were created for publishers to present author workshops. These workshops were also highlighted during events such as Open Access Week)
• Provide user focused training at CSIR level, Unit level as well as one on one training sessions
• 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.

With the marketing goals and objectives clearly defined, CSIRIS 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.

**PRODUCT TRAINING**
CSIRIS’ greatest challenge is having to justify to the organisation the value of subscribing to good quality information resources. The monitoring of licensing agreements, pricing models and other aspects regarding electronic resources also remain a challenge. Due to budget constraints CSIRIS cannot subscribe to all the electronic resources available on the market. However, what we can ensure is that electronic resources covering all areas of research undertaken by the CSIR, is somewhat catered for and through customised training sessions to individuals and groups, the Information Specialists can make an effort to promote all products and services sufficiently to ensure optimal utilisation by all CSIR researchers. Training is a way to ensure a return on investment in subscription databases and how useful these products are, is based on researchers’ usage of them.

Training sessions at Unit level are hands-on workshops aiming to cover an array of databases needed by the researchers to do their every day job. At an individual level it is a one on one training session between the Information Specialist and researcher. The goal for both is to provide the user with search techniques and a knowledge of the most appropriate database to use when commencing a literature study at the start of their research project. In addition to the training undertaken, new ways to supplement training are constantly investigated, for example, electronic tutorials have been created using “Wink” software. These tutorials together with the “How to…” manuals are published on the CSIRIS homepage.

In an electronic era where researchers tend to believe that Google can provide them with all the information they require, CSIRIS have had to be creative in their marketing techniques to convey to researchers, the message that most of the information they access on Google Scholar is actually what CSIRIS subscribes to. One of the training programs entitled “How to access full text” shows the researcher how to navigate around the CSIRIS homepage to access a full text article. Other training programs include “Search strategies” and the utilisation of reference management tools. Through these training efforts, the Information Specialists are able to market the value of the products and services and instil in researchers’ a confidence in their ability to deliver a value added service.

Client satisfaction with the training events is measured through a survey which users are requested to complete. CSIRIS aims to keep this client satisfaction above 90%. To always achieve this high client satisfaction rate, the Information Specialists are encouraged to improve their own knowledge and competence by attending appropriate database training events.

**EMBEDDED SERVICES**

“Embedded librarianship is a distinctive innovation that moves the librarians 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 librarian’s information expertise” (Shumaker, 2012).

At the heart of it, embedding our services within the Unit is really a relationship building activity between the Information Specialist and the Researcher or Research Group and an opportunity to market CSIRIS. This would give CSIRIS the opportunity to improve and
strengthen its service delivery. The emphasis would be on the personalisation of services and hopefully attract the non-users of CSIRIS through direct interaction with researchers, a key ingredient in the development of new services. It would allow us to be creative in the provision of new services by developing a close working relationship between Information Specialist and researcher where we can assess the researcher’s requirements and provide assistance at the point of need. Services are specifically tailored to suit the needs of a particular researcher or group.

The project commenced with an interview and needs analysis between the Information Specialist and researcher. The purpose of the “embedded” interviews was to identify information gaps in the research process and project life cycle and develop new services to address their information needs. Activities that formed part of the embedded service offering include the attendance of each research groups’ monthly meeting, giving the Information Specialists the opportunity to share information from CSIRIS as well as contribute to the teams work wherever possible. It gave the researchers’ the opportunity to approach us with their information needs and herein lay the potential for the development of new services. Attending these meetings is an excellent opportunity to increase CSIRIS’s profile by increasing our visibility. Other activities the Information Specialists involved themselves in were to schedule regular meetings to discuss existing services, needs, training requirements, and attend presentations or conferences relating to the researchers work.

WEB 2.0

To keep pace with the new technological changes taking place, CSIRIS investigated the use of social media to enhance service provision. The aim was to get communications started amongst research groups so that they didn’t have to rely too much on their e-mail for communication. Unsure of how this mode of communication would be accepted by researchers, CSIRIS investigated and implemented the following Web 2.0 tools: Wikis, Blogs, RSS feeds, social bookmarking sites, and social networking sites. The use of Web 2.0 further enhanced the embedded services by extending the provision of specialised information services with the advantage of the opportunity for collaboration. Not all of these Web 2.0 tools were successfully implemented in the long term. The ones that were successful at CSIR are the social network “Yammer”, the blog and RSS feeds.

Subject blogs were set up for the various Units by the Information Specialists to serve as a current awareness service as well as an information overload prevention strategy. This is another user centred service and an opportunity to use interactive web technology for communication and marketing. The blog served to communicate the latest and most relevant information to researchers in their field, circulate journal content pages and CSIRIS updates that are of relevance to the researcher. The blog is searchable and available to researchers as and when needed. It is an excellent marketing tool which has increased the visibility of CSIRIS and which showcase the Information Specialists’ professional expertise.

PATENT LANDSCAPING
The advantage of being embedded and working closely with the researchers’ is that the Information Specialists can recommend information services that researchers’ are unaware of, and which they would benefit from, such as the need for patent landscape studies. We extended patent landscaping studies to all CSIR employees after successfully offering the service on a small scale since mid-2011.

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.

The Information Specialists actively marketed this patent landscaping capacity to their respective units to create awareness of this service through the following means:

- A patent landscaping article was published on the CSIR Intraweb
- CSIRIS decided to upgrade 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 capacity to the Intellectual Property department and CSIRIS was asked to give a demonstration at the CSIR Technology Transfer Forum meeting. This marketing effort was rewarded when the CSIR Research and Development Outcomes managers were advised to use CSIRIS’ expert services.

CONCLUSION

The adoption of a marketing plan with a customer focused approach towards service provision and the constant quest to develop new services that are in alignment with researchers’ needs have been the goals of the CSIRIS marketing team. 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. As part of an on-going evaluation of services and needs, CSIRIS is about to undertake an information audit yet again.

Through all these changes and adjustments, what must remain constant, is the ability to evolve and innovate. “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).

REFERENCES


