



Achieving Operational Excellence: Best Practices in Health Science Libraries

A Quantum² Webinar

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- Quantum² is:
 - a professional development program for information professionals
 - a combination of training, communications and tools to help information professionals develop leadership skills and demonstrate the value of their services within their organizations
 - available free to information professionals worldwide
 - <http://quantum.dialog.com>

Business Competencies

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

Strategic Competencies

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



- Alignment of information service with key organizational goals and critical initiatives
- Knocking down of physical walls in global companies
- Availability of information in users' digital workspace – The Virtual Library 24/7
- New information technologies
- Flat budgets, staffing levels, and outsourcing of key operations
- It's all about Content! - *multiplicity, evaluation, deployment*
- The “Google Effect”
- Disintermediation : users bypass Info Pro's
- ...

- 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*
- Demonstrate analytical skills for added value
- Increase skills portfolio for content deployment
 - *web/intranet/portal development*
- Understand the true information needs of the organization
 - *needs assessment, info mapping*
- Take in to account the diversity of users' requirements
 - *departmentally and globally*

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 **geminfo.org/help/**
A best practice is the best way of carrying out a function or process.
ary-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/library/glossary.htm
- 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

- Create more value :
 - through effectiveness, efficiency & economies
- Improve work processes
- Maximize your current resources
- Explore new services or products
- Build stronger relationships across the organization
- Raise your level of importance and prove your value

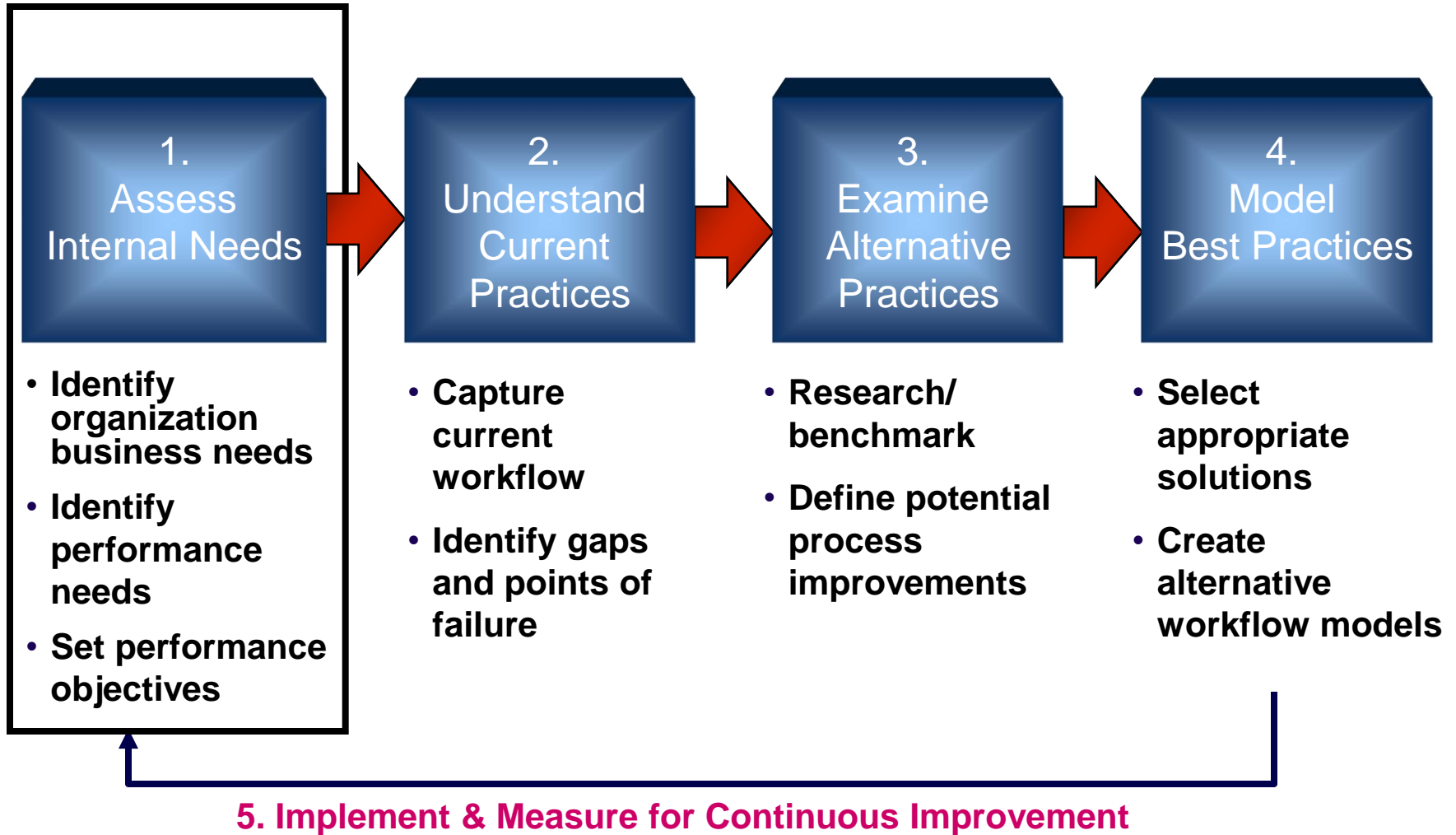
Internal Obstacles

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

External Obstacles

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

Four Steps to Operational Excellence



A. Identify the organization business needs

- Who are your customers?
 - Senior management
 - You need to impress them
 - Client users
 - You need to please them
 - Information Centre staff
 - You need their full support

A. Identify the organization business needs

- What are business needs ?
 - gaps between a “status quo” and new or better ways of working considered as “high priority”
- Why are they not met ? Identify why ...
 - analyse and describe them, focusing on
 - the customers
 - the new or improved ways of working
 - the changes involved
- Remember ...
 - ... filling high priority gaps is what counts most for Senior Management!

A. Identify the organization business needs

How to identify business needs ?

- Determine the goals, objectives, concerns 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 from
 - Sample information requests
 - Reading internal documents
 - Compelling business or financial events
- Make the Information Centre visible and proactive
 - Get out of the library - “Walk the floors”
 - Keep communication channels open

B. Identify the performance needs

- What are our performance gaps ? What do we need in order to perform ?
 - Define the desired performance
 - What are you expected to perform, how and when?
 - Describe the actual performance
 - the difference between the two is the “performance gap” /need
 - Analyse why ...
 - Select appropriate action(s) to improve performance
 - e.g: appropriate solutions, information content, skills or training

B. Identify the performance needs

Two perspectives :

- the 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

- the clients
 - availability and expertise of staff
 - the right information/content at the right time
 - how easy it is to obtain information
 - how long to fill a request

C. Set performance objectives - analyse the data

Four questions to balance against each other to find the best compromise:

- 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*)

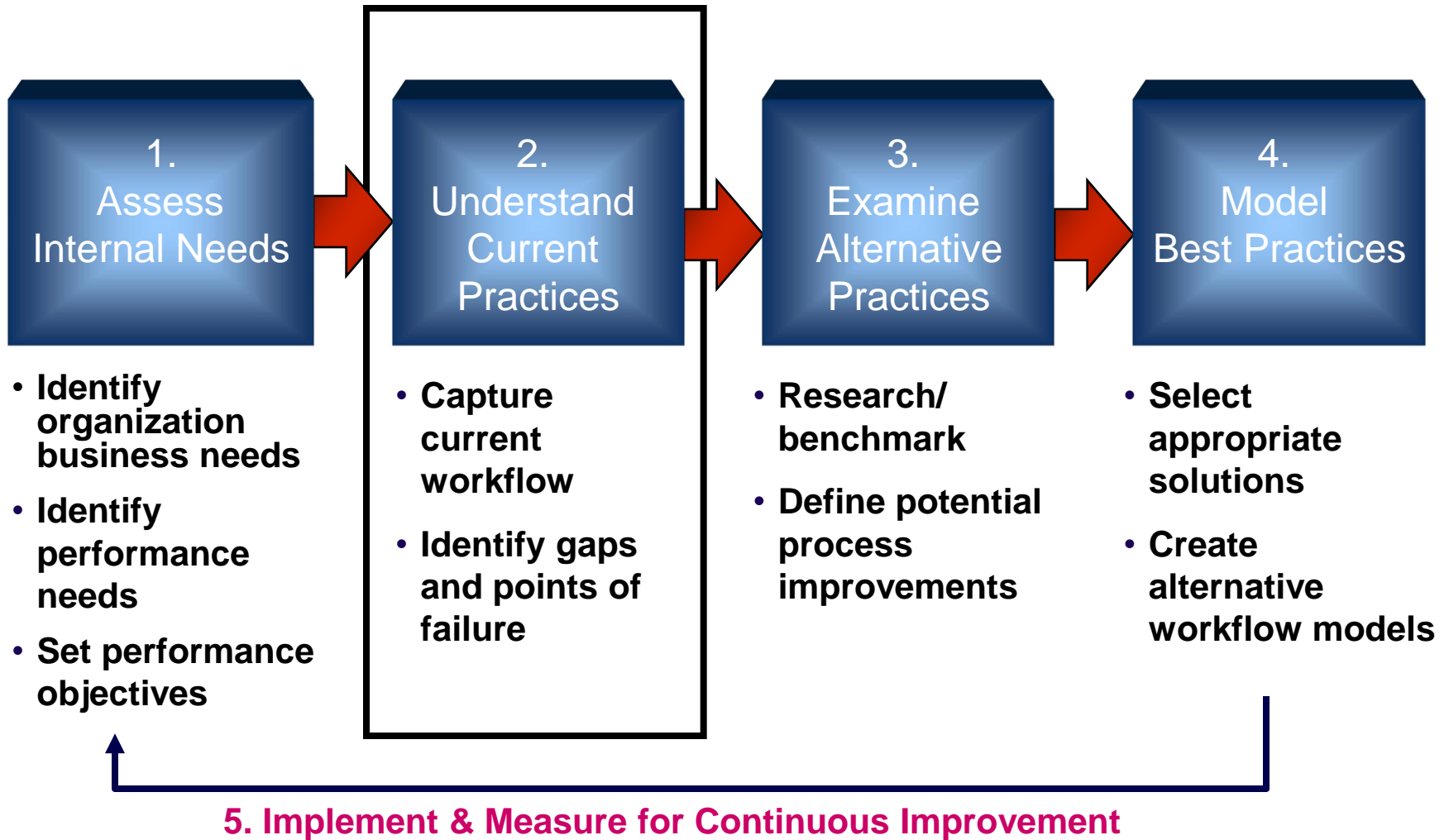
(... the Balanced Scoreboard)

C. Set performance objectives

some specific questions ...

- What do users value?
 - do we need to re-think the content selection?
 - have we discovered additional justifications to support your budget?
- Do we have a feedback loop ?
 - does our valuation of services match our clients' view?
- Are we doing things right? Are we doing the right things?
- What is the minimum performance our users expect?
- What is the maximum?
- ...

Four Steps to Operational Excellence



Workflow A : a sequential list

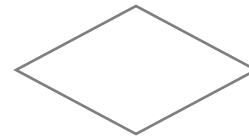
- Handling an information request
 - receive request for information
 - log request
 - conduct reference interview
 - conduct research
 - write up report
 - deliver to customer
 - follow up for feedback

- Does it work ? Are we missing something ?

Workflow B : a flowchart - ADDS



Activity



Decision



Direction



Start/Stop

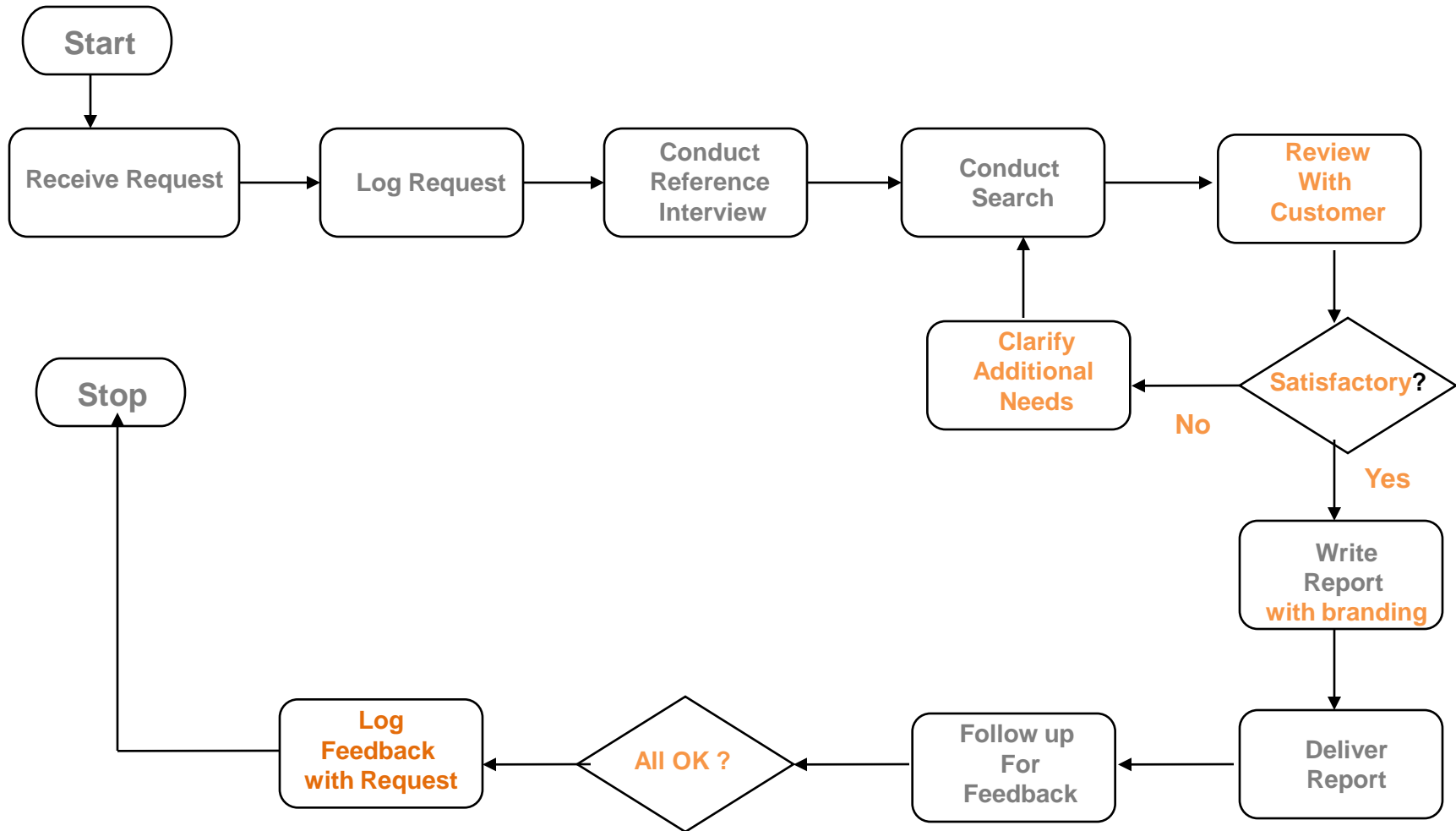
Does it work ? Are we missing something ?

Workflow A with gap analysis : a revised list

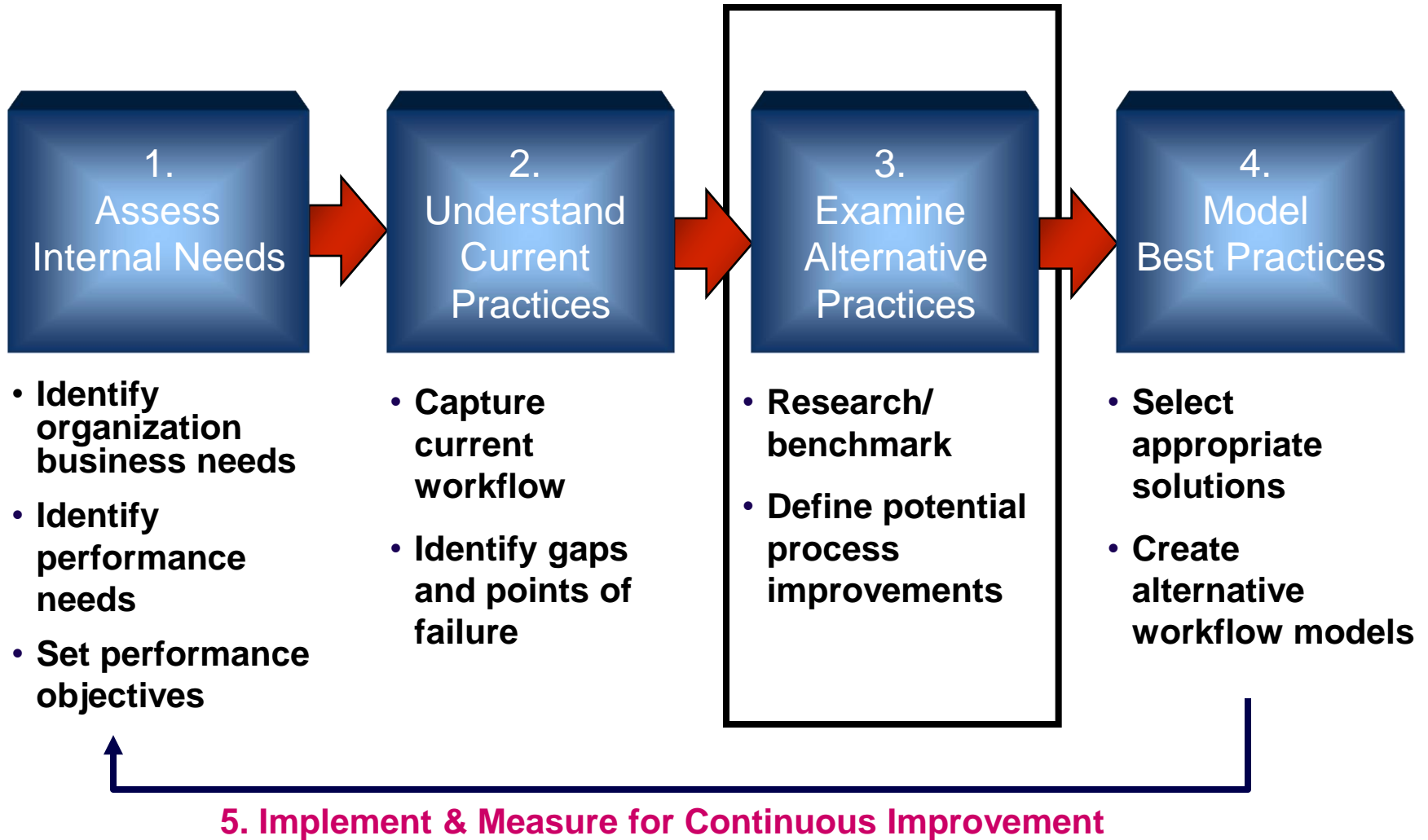
- Handling an information request
 - receive request for information
 - log request
 - conduct reference interview
 - conduct research
 - review with customer
 - satisfactory
 - or
 - not Satisfactory
 - clarify additional needs
 - conduct research
 - review with customer
 - satisfactory
- write up report
 - include branding
- deliver to customer
- follow up for feedback
 - all OK ?
 - log feedback

Step 2: Understand Current Practices

Workflow B with gap analysis : a revised flowchart



Four Steps to Operational Excellence



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

- Two ways to benchmark
 - internal benchmarks
 - bring together staff responsible for a major initiative with others in the organization to share information, ask advice and discuss lessons learned
 - external benchmarks
 - research & learn from external, preferably world-class organizations

How to Get Started

- Informal methods
 - networking and knowledge sharing
 - together with secondary information (journal articles on other libraries, SLA resources, call other libraries, companies,...)
- Formal methods
 - engage a research firm
 - purchase a report (→ search Dialog files)

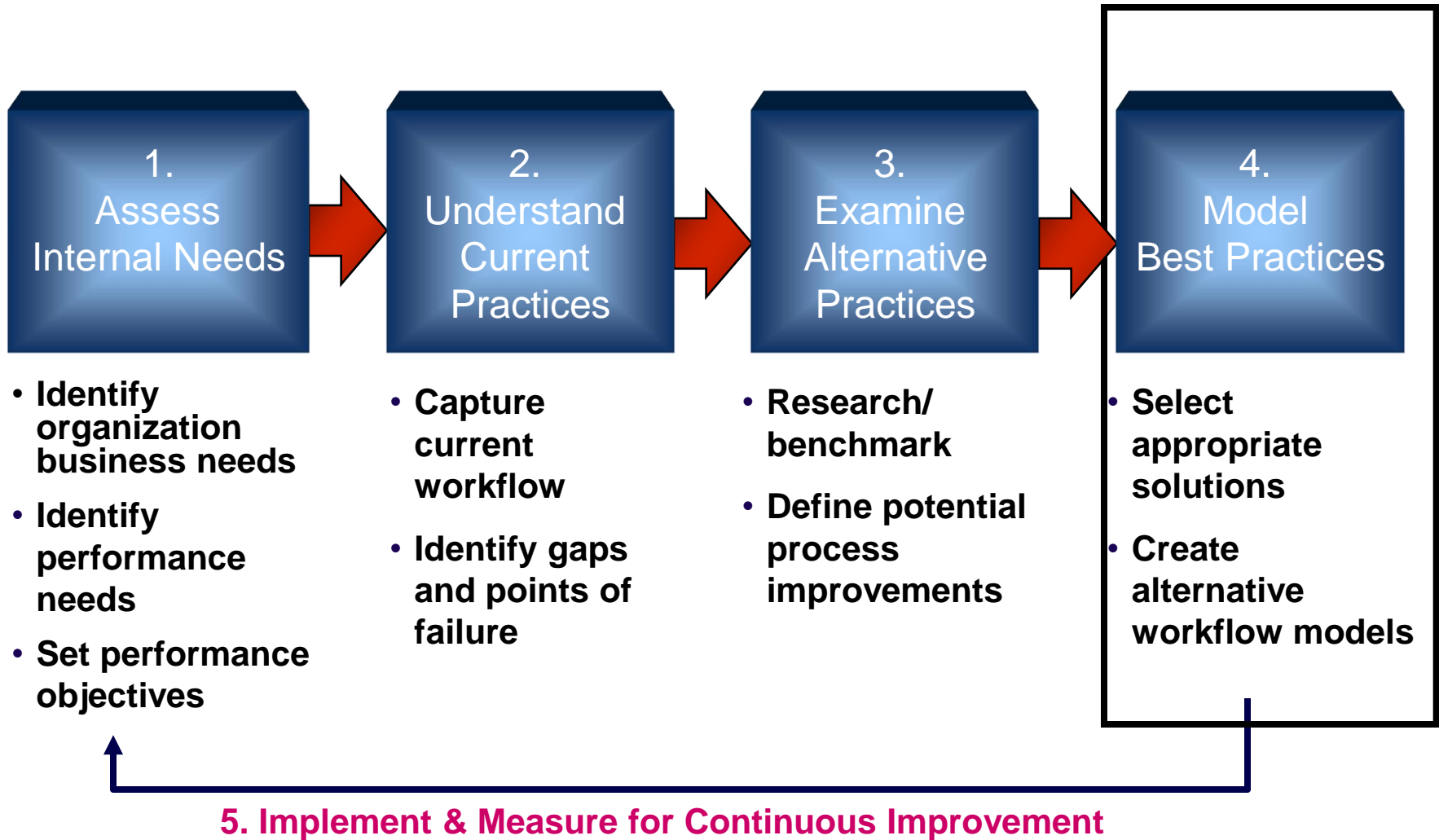
- Gather as many data as possible :
 - Your competitors : Competitive Analysis
 - what are they doing with information?
 - what processes have they implemented?
 - what information policies do they have ?
 - Your colleagues : Networking - Knowledge Sharing
 - communities of practice (CoPs)
 - leverage in at the start / leverage out at the end
 - research / re-use
 - External Resources (if supported by senior management)
 - benchmarking reports
 - external consultants
 - networking with peers in other companies

Define Potential Process Improvements

- Look for the points in the other best practices that can
 - improve your current workflow
 - speed the process
 - increase the quality
 - ...

- note all these potential improvements in a revised workflow

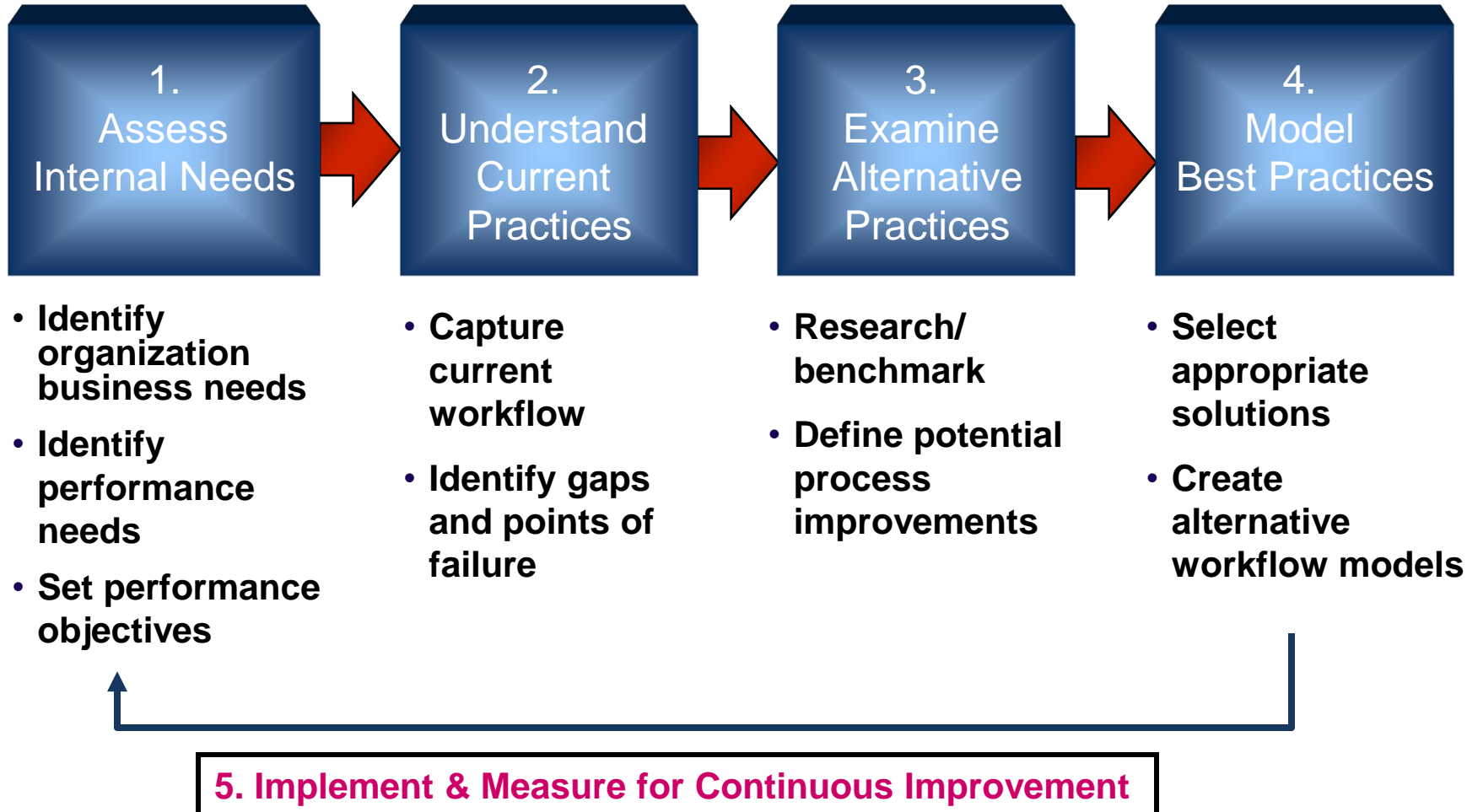
Four Steps to Operational Excellence



When selecting the most appropriate solution(s) :

- Assess through financial lens
 - Costs
- Balance the costs against the benefits
 - for organization
 - (bring savings through improved efficiency)
 - for clients
 - (win new partners in supporting increased budget,...)
 - for Information Centre staff
 - (generate better use of time/effort, better morale, better relationships)

Four Steps to Operational Excellence



A Very Crucial Step :

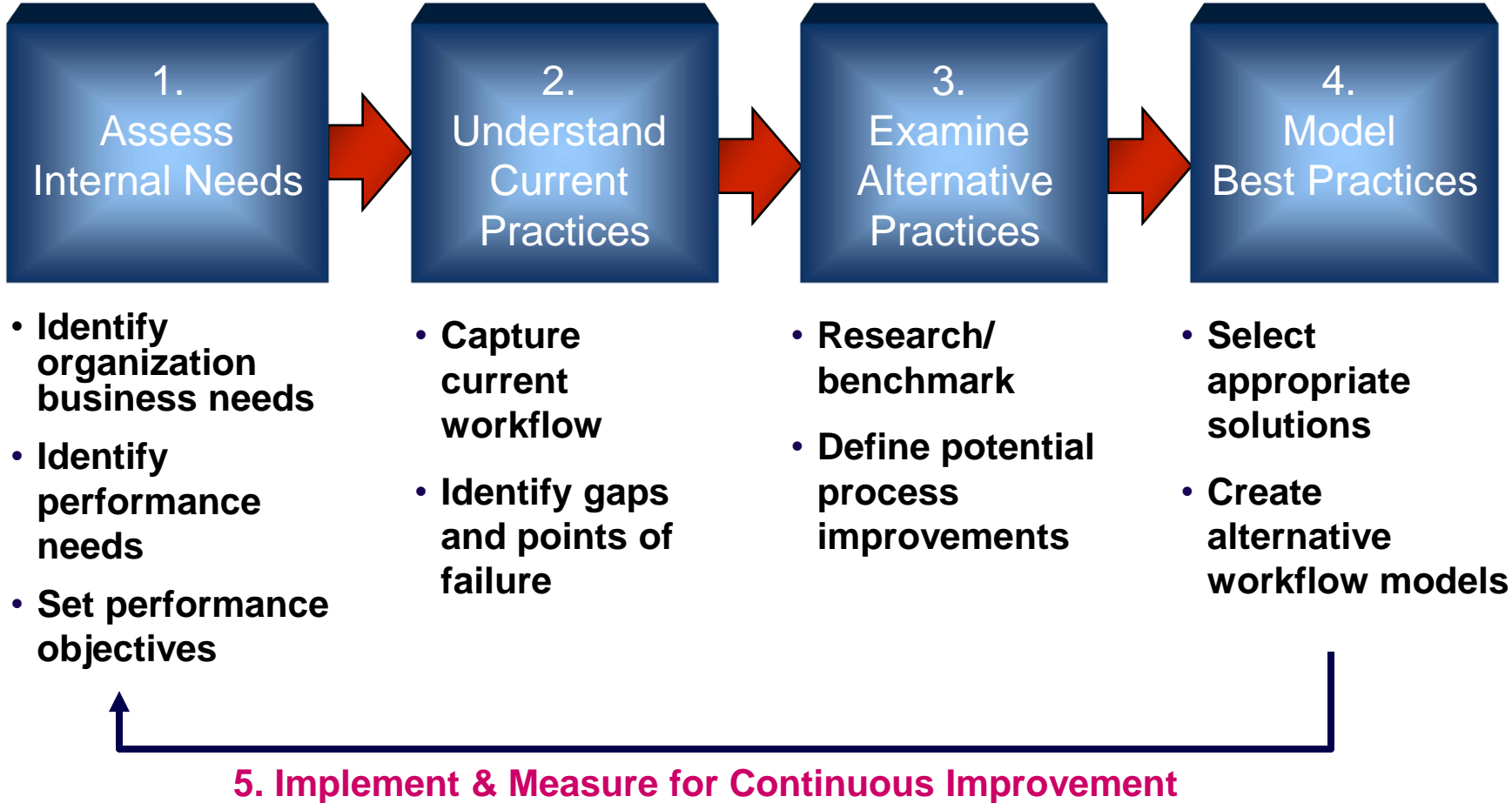
- Take a visible role in leading the Best Practices process so that it becomes self evident ROI !
 - for the organization
 - for the Information Center

Make sure everyone is involved in the process !

- Top down : find a champion
 - senior management support
- Bottom up : let your clients
 - identify the business knowledge they need
 - identify your performance level
 - take ownership of the process
- Middle out : YOU will need to
 - provide the tools, process, training, communication to make the new best practice process succeed

- Communicate benefits to all level of customers
- Opportunity to partner with corporate marketing communications
- Publicize examples of business results supported by the project
 - improved access to information
 - reduced project cycle time
 - cost savings
 - ...
- Be visible, show visible results → ROI
 - for the organization
 - for the Information Center

Five (!) Steps to Operational Excellence



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Any questions?

Thank you !

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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?