

Whitepaper

Proving Your Value

Making the Case for Information Services

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Corporate information centers and knowledge managers have always had to justify their budgets and often attempt to calculate the return on investment that their organization receives from the information center's services. They gather and analyze data on usage, expenses and time saved to demonstrate the value provided for the information center's budget.

While these metrics are useful, they may not adequately convey the full impact of the services provided by today's information centers. In addition to straightforward calculations of time and money saved, information centers are offering new types of services that do not easily lend themselves to a simple ROI calculation. Instead of talking about doing more with less, the conversation is now about doing something more valuable, creating insights that were not possible before, and contributing directly to the strategic business goals of the organization.

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In order to effectively communicate the full ROI of the information center, managers are turning to more qualitative measurements and to strategies that visibly align information services with the goals of the organization. Information centers are changing their focus and looking to go beyond information portfolio management; now, information managers are considering their role in making information more discoverable rather than simply accessible. Their role may include acquiring or licensing content and datasets for text and data mining, identifying taxonomies to use for semantic enrichment of licensed content, integrating bibliometric tools into the measurements of organizational and individual impact, or participating in or leading up efforts to bring together previously siloed content and data sources. These new capabilities enhance the value of information and bring new levels of insight and analysis to researchers. They require new approaches to articulate their value.

This whitepaper is based on interviews with four thoughtful and strategically-focused information professionals. One of the recurring themes from these conversations is that taking a corporate-wide look at spending makes information professionals somewhat unusual within their organizations. Unlike most other functional areas, information center directors are managing budgets that benefit all the key areas of their organization, and the return on investment and value proposition needs to encompass the impact the information center has on the key goals of the entire organization.

Identifying the full value of information resources

One way information professionals bring value to their organizations is in their understanding that simply providing access to full-text documents may not best address their users' research needs. By using internal tools or third-party services to provide licensed content in structured XML format and semantically enriched with structured metadata, researchers can glean important insights not discoverable from a simple search and read. The manager of a health sciences information center commented that "I see us primarily as a service rather than a place, and part of our service is helping clients get better value from our e-content." That may be anything from identifying the most cost-effective dataset for a given project to helping a group license an API to pull together and analyze research data from a wide range of sources.

Information managers are challenged with conveying the strategic value of their centralized purchasing for information resources that will — or could — be used for multiple groups or functional areas. A biotech information center manager emphasized the distinction between the strategic savings and cross-sharing of resources realized by coordinated content acquisition and the more administrative functions of his organization's purchasing department. "We think about the whole life cycle of the information we are buying, what other uses it might have, what other groups might want to have access to it. Information centers have always served to connect groups together, so when I hear that someone has licensed a particular dataset or API, I make sure I put them in touch with any other group that might need that resource as well." Information managers can highlight their unique perspective on how information is acquired, enhanced, used and saved within the organization — identifying and breaking down departmental silos, and building synergy among information user groups.



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Managing the content acquisition function and negotiating high-budget content licenses means information managers must be able to justify their expenditures and fend off the annual budget-chopping that big-ticket line items attract. The Information Center manager of a pharmaceutical company described the approach he takes to ensure the financial leaders understand the ROI for the Information Center's content budget and recognize the scrutiny that these purchases include. "Every year, I evaluate one of our biggest platforms in partnership with our sourcing people. I bring in some of the heavy users and we all look at the current provider and the competitive options, and decide whether this is still the best choice for us. This has worked out really well; it has a lot of impact for the limited time I have available, and it gives me a lot of leeway with the financial department. They can see that we are doing all we can to ensure the most value for all our subscription purchases. When I tell them we just can't eliminate an expensive resource, they know I have done my due diligence."

and that we are vigilant about our expenses. They give me more flexibility in addressing budget crunches because they trust me.” This kind of ongoing, proactive scrutiny and engagement with all the key stakeholders can help ensure that the Information Center continues to receive the financial support needed to support the goals of the organization.

In addition to these top-to-bottom evaluations of an information service, information managers can take the same approach with other content subscriptions. One information center manager takes a multi-pronged approach to justify her e-content budget and connect her spending with strategic outcomes for the larger organization. She creates compelling graphics that highlight departmental usage and correlate information center spending with specific activities. In addition, once a year she conducts an in-depth analysis of all her ongoing content usage — online journal publications, print subscriptions, and electronic databases. She evaluates each resource with an assumption that every information source has to be justifiable today, based on both the amount and type of usage. “We usually face a flat or reduced budget every year, and it is critical that I can show that we are acquiring the right content for strategic reasons”, she noted. “It takes 80 or 100 hours to do this level of analysis but it’s worth it, because upper management knows that we are spending money to best benefit all the key areas of our organization.”

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Aligning with organizational priorities

Of course, ROI messaging needs to look at more than just line item expenses. A manager of a healthcare information center noted that, while usage metrics and cost savings are important, “for us, a softer approach and a focus on building awareness works well.” She described how critical it was for information center staff members to be actively involved in the key projects throughout the organization, serving as information consultants at project meetings and anticipating the team’s research needs. “We make sure we are always plugged into the bigger perspective and ensuring that our resources and services have a direct impact on the larger goals of the organization. The more we can align with the priorities of our organization and be seen as early adopters of new initiatives, the more we’ll succeed.” This proactive approach to both identifying opportunities for collaboration and serving as virtual embedded information professionals for project teams ensures that the information center will be able to anticipate and address the information needs of the strategic initiatives of the organization.



Capturing and highlighting the most impactful moments of an information center's service requires ongoing awareness. One information services manager noted the importance of connecting the information center's operations with the mission and vision of the overall organization. Every quarter, she reaches out to each of her team leaders, asking for at least one example of how their team contributed to the company's strategic goals. "I tell my folks I know there's something you have done that was important for our company. One of my team leaders had finished a project that had a lot of impact but she was reluctant to brag about it. I asked her to just describe it to me and I showed her how to write it up so I could include it in my quarterly report to upper management. She received recognition for her achievement and now she really understands how important it is to spot those big wins and talk about our work." This kind of mentoring is critical; most professionals in any field are understandably focused on the operational aspects of their work, and need encouragement to capture and share examples of where they made a difference.

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Information centers can take similar approaches to embedding information resources and services in key aspects of their organization's operations. The director of a research institute's information center emphasized the importance of having the library clearly aligned with and tied to her organization's strategic direction. "Every year, I get copies of our mission statement and organizational goals. My staff and I study them and determine as a department how we can help the researchers accomplish those goals. This enables us to identify and measure where we have the most impact within the institute." She also uses bibliometric tools to identify the impact of the published authors within the institute; her annual compilation of that information has become the standard within the organization for evaluating researchers' influence and awarding bonuses. "I really wanted to expand how the information center was viewed within the institute, to find ways to integrate ourselves into the systems that measure the organization's most important activities," she said. "When we are integral to the compensation system, we don't have to have a conversation about whether we need a particular resource."

In the same vein, information centers enhance the value of the resources they acquire by enabling more strategic sharing and collaboration. For example, the biotech information center manager quoted above brought together a number of data scientists from different parts of the company to share what they were doing with a particular dataset that the information center had acquired. He told me, "it was great to see them talking together and finding new ways to collaborate! A really important aspect of the information center's service is that we are the central connecting point for groups that otherwise wind up getting siloed. The information center's function is to think broadly and use enterprise licenses to connect groups and resources together.

This helps make our ROI really tangible. In fact, I asked the data scientists for help in articulating the value of the dataset they were all using, to describe how it helped them solve a problem. Capturing these stories is essential for justifying our budget, and they were happy to help.”

Capturing “value moments”

The biotech information center manager I spoke with made an interesting discovery when he surveyed his users. He realized it can be difficult to get information center users to articulate the impact that information services and resources have on their own success. Therefore, it often falls on information center staff to identify those instances where they add strategic value to the organization. He reminds his staff often that they cannot assume that their users recognize the impact — and the professional work behind the scenes — of the information services and resources provided.



Another information services manager mentioned the value of developing relationships with key people within each user group. He regularly schedules coffee with his various contacts, and he listens for success stories that tangibly demonstrate the value of the information center’s content. “It takes time but it’s so rewarding to hear about the impact of the information we bring into the company,” he said. By watching for these value moments, he also learns how his users describe the value of the information center. He can incorporate that language into conversations he has with his upper management, which makes for a more compelling and memorable description of the impact of the library on the organization’s overall success. He is aware of the need to find language that a busy executive will retain, focusing on how the information center gives the organization a competitive advantage, helps retain key talent, and advances the strategic goals of the organization.

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One habit that several information managers described as critical to their ongoing success was never getting complacent about the need to talk about the library’s value. Executives change roles — and employers — so there will always be new people coming into upper management positions with whom the information center needs to be engaged. As one information services manager put it, “It’s easy to get frustrated when you feel like you’re always having to explain the information center to another new executive. I just remind myself that this kind of advocacy is an ongoing exercise, whether it’s telling a new VP about our services or reminding a long-time director about a resource his staff depend on. I always keep an updated slide deck ready to make the case for the value of the information services we provide.” Another information center director said, “Every time I’m with the financial or sourcing people, I talk about where we’re planning on deploying a resource or adding value, or I’ll tell them about how the information center connected two groups together who needed the same content. I try to always have a fresh story that’s memorable and relevant.”

Who, why, what, how, when?

As is clear from the experience of the information center directors interviewed, when information managers build their strategy to communicate their ROI most effectively, they have to address all aspects of telling a good story — who, why, what, how and when.

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WHO are you talking with?

The leaders who have the ultimate authority over your budget need to understand the information center's strategic role within the organization. Engage all the stakeholders involved in sourcing licensed content, so they see first-hand how committed the information center is to delivering the content and data the way their users need it. Stay in regular contact with allies and information gatekeepers within departments and business units, share information about new resources, bring data users together to share insights and tools, and keep on top of each user group's most vital information needs.

WHY is the information center valuable?

Just as the larger organization needs to continually adjust its strategic and operational goals to reflect today's concerns, information managers need to conduct an annual review of the information center's goals, objectives and metrics, to ensure the information center's operations align with the highest priorities of the organization. They also need to evaluate new tools to increase discoverability of information through semantic enrichment of content and evaluate new data sources for text and data mining initiatives. The more tangible the correlation between information services and organizational goals, the easier it is to show the value of those services. Regularly ask the information center staff for stories of the information center's impact and encourage them to watch for "value moments" to highlight the ROI of information services. Hone these stories down to just two or three sentences, emphasizing what the user was able to do after having utilized the information center's resources and services.

WHAT impact does your information center have?

Use or build tools to help you measure the impacts that matter most to your organization; find ways to embed the information center's resources in strategic organizational metrics. Solutions that offer dashboards can tell the story of the ROI on your content usage and spend in compelling data visualizations.

HOW are you describing your services?

When talking about the information center's operations, it is easy to focus on activities — what research and consulting services are offered, what digital resources have been acquired — rather than the outcomes enabled by those activities. However, if you cannot articulate to upper management the impact the information center has on the organization, you are vulnerable to getting your budget cut. Reach out to key users and get them involved in talking about the information center's impact and advocating for information center funding. One effective technique for identifying value statements is to ask users how they describe the information center's services to a colleague; their response will invariably focus on outcomes rather than specific information center activities.

WHEN are you talking about your value?

Advocating for the information center is an ongoing activity, and it is critical that info pros be prepared with a compelling story about the impact that an information service or resource had on a project or team. All information center staff can be encouraged to create their own value stories that connect their activities to the goals of the organization. Information center directors can support these efforts by explicitly linking each staff member's responsibilities to strategic outcomes, and by reviewing the information center's activities regularly to ensure that information services and resources continue to be aligned with the organization's priorities.



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