



Supplemental Content to the article “The Business Case for Information Literacy: Why Training Is an Important Information Services Function” by James M. Matarazzo, Dean Emeritus and Professor, Graduate School of Library and Information Science, Simmons College, and Toby Pearlstein, Retired Director of Global Information Services, Bain and Company, Inc., appearing in the September/October 2014 issue of *Online Searcher* (Vol. 38, No. 5, pp. 42–50)



The authors of the following commentaries are information professionals who were asked to share how they think about and use customer training as a way to demonstrate and sustain the contribution IS makes to their employer's success.

The Future of Training

Kathy Rogers

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When I began my career in the field of corporate training more than 25 years ago, I started hearing about the demise of instructor-led training. Today, that buzz is still present, and while there continues to be a demand for live courses, there has finally been a more significant shift away from instructor-led courses.

What is different? Now, the demand is not for a multi-hour training course, whether live or online. The need now is summarized by the cliché—“Just enough” or “Just in time.” Online “courses” are typically less than 20 minutes long, the shorter the better. The information needs to be mobile-friendly and succinct enough to be viewed or heard on a laptop, phone, or tablet. The demand to get the nugget of information needed without navigating through a maze of links, pages, or websites is a key driver for the information seekers of today.

Classic live training courses that previously started with 30 minutes on the agenda to review learning objectives, ground rules, and a round of introductions are frustrating to anyone who can easily go to YouTube and learn the basics of just about anything in less than 10 minutes. Want to pick up tips on using Outlook or SharePoint, or even determine the best technique to fold fitted sheets? It is all there. Not only is it there, it is available for immediate use. Do I think this will take the place of live learning? No, not entirely.

While quick, online courses are an incredibly important part of the training/learning landscape of the future, the need for live interactions will remain. Certain skills are best taught when there is true face-to-face interaction; selling skills and coaching skills come to mind as examples. These live interactions can also occur via video-conferencing or applications such as Skype, although role plays are still a challenge using these methods. The most successful use has involved bringing in experts to add depth to a discussion in a particular area of expertise. These are certainly options that grow more feasible with each technology enhancement.

So what is the future of training? I wish I knew, but my take on this is a blended model, not one size fits all. The need to do the analysis up front to determine the best delivery method for the specific audience and content has never been more critical than it is today. With the multitude of options available, the possibilities to tailor the correct delivery method for the content and audience make this an exciting time for both the instructor and the learner.

Who Will Bridge the Gap?

Laura Saunders

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Literature on instruction in corporate libraries is sparse. There was a small spate of writing on internet instruction in the late 1990s into the first few years of the new millennium, but since then, most of the literature seems to focus on other topics such as knowledge management, reference, dissemination services, and marketing. This contrasts with academic libraries, where librarians have been taking on greater instruction responsibilities and are, in turn, increasingly identifying themselves as teachers.

There is plenty of literature on library instruction specifically targeted to business programs and their students, and the term “business information literacy” has been coined to describe the particular competencies needed to find, evaluate, and use information specific to the business world. While information literacy instruction in business programs still focuses on general competencies of critical thinking and searching, there is an additional emphasis on terminology and resources specific to business. These resources include “industry information, economic data, company information, financial data, contact information, demographic data, and legal information” [4].

As the amount and complexity of this information continues to increase, there is evidence that business students are not the only ones who need assistance and instruction navigating the resources. Business professionals might benefit from information literacy instruction as well, and such instruction could be a prime role for corporate librarians. In a knowledge economy, information is a commodity. Therefore, the ability to locate relevant and authoritative information efficiently and effectively is a core skill that is highly sought by business employers. Nevertheless, employers often find these skills lacking in their new hires. Fewer than half the employers in a national survey indicated that recent graduates are adept at incorporating information to develop insights and make decisions [2].

Similarly, Project Information Literacy found that while employers value a range of search and research skills, new graduates rarely demonstrate these abilities [3]. The graduates themselves also recognize that the techniques they had used in school are not always enough to solve workplace information problems. At the other end of the spectrum,

employees who have already been on the job for some time may not have had opportunities to learn newer resources and search techniques. In either case, these employees may be wasting time on inefficient searches, which ultimately costs their company money.

These studies indicate an opportunity for corporate librarians to help bridge the gap between employer needs and expectations and employee skills in locating, evaluating, and using business information. Instruction can take place in a variety of different formats, including one-on-one or group workshops and online and face-to-face formats, and could involve learning objects such as self-paced tutorials that employees could consult as needed. Further, corporate librarians could save their colleagues and companies both time and money by offering such training. Indeed, Heather Ganshorn found that librarians involved in point-of-care research as part of a healthcare team averaged 7 fewer minutes to find answers than the healthcare practitioners, which resulted in cost savings of \$13 to \$20 per question [1]. If corporate librarians could document that kind of benefit for their companies, the data could go a long way toward supporting their value to the organization.

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Training in a Business Environment Compared to Academia

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While manager of investment information at money management firm Wellington Management, I took on the added role of information trainer for new staff in areas that needed interaction with systems—internal and external—that were key to the investment process. It was not

that I was an expert in these areas, but knowing the context and the needs for the data made me highly aware that new hires required a level of basic, hands-on training that I could deliver in order to make them functional and aware of the data quality checks required. Did I ever consider myself an instructor or trainer? Definitely not—this was simply part of the job of integrating new staff into a complex, information-dependent organization, and all staff were expected to perform this role. I focused on external datasets and providers while other staff specialized in internal systems data.

Who had responsibility for training? No one—for many years it was shared across the firm and understood as part of each team's responsibilities to provide their newer members with the knowledge to be successful in their jobs. I held one-on-one or small group training sessions with new hires from various departments on an as-needed, ad hoc basis, and there was no structure to the timing, focus, subject, or quality of the training provided. As in most growing organizations, it worked until the demands overtook it.

By 2006, there was a firm-wide focus on a top-down, integrated approach to the recruitment, development, and training of new staff and even an IT-sponsored initiative for training recalcitrant investment managers in learning new applications deemed essential for growth. A senior position was created to manage the efforts on the investment side. I worked with outside investment and academic consultants to coordinate the curriculum and to mentor the new staff in the program. It was working very well—until the markets hit the skids, and by year-end 2008, the program was abandoned, the staff laid off, and the junior hires left to fend for themselves in a suddenly less-supportive firm.

I was lucky enough to join Babson College in early 2009, working in the library with its Cutler Center for Investments—a finance lab that used the same investing tools as my Wellington information center. Instead of point-of-need, ad hoc training, I was introduced to a program of real curricular and co-curricular instruction that incorporated course-based concepts and practical application and exercises with real-world tools such as Bloomberg, Capital IQ, FactSet, and many unique data resources. Using many types of instruction and instructional technology, we do our very best to give undergrad and M.B.A. students a practical introduction to the application of the major financial toolsets in use. My concern is what awaits newly hired grads when they begin their careers. Except for the larger investment banks which have a rigorous training rotation, I have found very few financial firms that do more than a brief introduction to the systems and processes in use; most rely upon the vendor sales rep as the primary resource. Is this a forward-thinking way to ensure knowledge succession and avoid system downtime? We often complain that library/knowledge management is the first area to be tossed overboard. The training budget is a close second.

Have It Your Way—Untethered at Last

Corilee Christou

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Training users to navigate successfully on online databases is now conducted in whatever fashion best suits the customer. Customers can choose online interactive, self-driven courses; customized one-on-one training; or even in-house training for a group of users at a single company.

Way back in the beginning of online services, when moving from 300 baud to 1200 baud was a huge step, and training required the vendor to supply the terminals either in an office location or by setting up a training room at a customer site or even a hotel room, sales reps used preset training modules to help users understand how to use the services. Consider too that at that time, wireless communication was reserved for government use.

It is now 2014, and in just 30 short years—less than half the time it took for the telephone to be widely adopted—the number of devices and ways that a customer may choose training has grown in leaps and bounds. Tablets, iPads, home computers connected at speeds ranging from 6 to 10 Mbits per second, and even cellphones are now capable of enabling a user to connect to a LexisNexis training session. Not only has the technology exploded, but so too has the amount of content that LexisNexis has to offer. Today, users are not just asking how to use the services, they are also requesting help in narrowing down the results to find the “right” answer.

Darryl Cross, LexisNexis vice president, performance development, is responsible for training the sales force and research consultants at LexisNexis. As Cross indicates, “Customers no longer need or want to know everything. Instead they are looking for ways to refine their search to retrieve better answers.” Cross continues, “Users today are untethered and want to use multiple devices to train, so we also need to offer training via multiple platforms including iPads, iPhones and Androids, via YouTube, WebEx, webinars, and online tutorials accessible via any device.” Cross says, “The new Lexis Advance Platform provides users with the ability to conduct searches from any device anywhere, using the Lexis Advance HD iPad app, iPhone app and mobile website optimized for small-screen devices.” According to Cross, generational differences, including receiving answers on a small Google-like piece of real estate, have also significantly influenced how LexisNexis products are now designed and displayed. A new landing page option helps users navigate and narrow their result set as do new search refinement tools and graphical/analytical display options.

In today's world, it is the customers who have changed, and with them, their training requirements. Susan Elam, LexisNexis regional sales manager for corporate legal, current manager of the Corporate Counsel Consultants, and a former LexisNexis information professional consultant, has been with LN for 20 years. Elam notes, “These new users are true millennials: the first to grow up with computers in their

homes, the first to own a computer or tablet of their own, own a cellphone, own an MP3 player, use instant messaging, and use the internet as their primary news source.”

Elam adds, “These users do not want general training. They want very specific training, no longer than 20 to 30 minutes, that is tailored to what they do, whether it is labor law or bankruptcy, intellectual property, or other areas. Our biggest competition today is not other online services, but the customers themselves and getting them to commit to training.” Clearly, she acknowledges the challenge driving this is Google, citing “its omnipresent search capability on

which current users have cut their proverbial search teeth.” To better meet customer needs, Lexis now offers coffee break webinars that address a specific subject matter or practice area. Additional options include Clear Slide, a 100% web-based application that uses scripted slides, interactive webpages, and screen sharing; WebEx for interactive classes and online training; and the new Lexis Advance platform that provides more tools and options to help users more easily scale their research options and answer sets anytime, anywhere, any way. As Elam puts it, “This is not your mother’s research service anymore.”