Information Counseling and the Outsourcing Challenge to Corporate Librarianship

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The outsourcing of information services challenges corporate libraries to shift their focus toward those services that are not readily "outsourcable." An analysis of library services indicates that the diagnostic level of service is potentially the least outsourcable. To effect this level of service, it is suggested that corporate librarians serve as information counselors on multifunctional project teams. A framework for an expanded model of the information counselor role integrating information diagnostic and repackaging services is presented.

oday, many corporations outsource their noncore functions to subcontractors in order to leverage resources and reduce costs.[1,2] Outsourcing enables such corporations to streamline all their functions so as to focus on their primary business, and may be undertaken as part of corporate downsizing, privatization, or reengineering exercises.[3] Although the impact of outsourcing on service quality is yet to be fully appreciated, this trend is expected to persist well into the twenty-first century.[4]

Libraries are not strangers to outsourcing, having benefited from outsourcing materials acquisitions and processing since early in this century.[5] Within this decade, however, some corporations have outsourced their entire library operations. For example, Baker & McKenzie, a Chicago-based law firm, fired its entire library staff in 1995, opting to outsource all its library and research needs.[6]

Examples of similar outsourcing decisions abound among other categories of corporate libraries in both the public sector, such as the U.S. Department of Education, and the private sector, such as Hamilton Oil, U.K.[7,8]

It is apparent, therefore, that outsourcing is redefining corporate librarianship. Although outsourcing has helped boost the market for independent information services, many librarians resist such a career move for fear of loss in pay, job security, and prestige.[9] Moreover, some corporations prefer nonlibrarian outsourcers who share in the specialized knowledge, goals, and strategies of their business. According to an agent of a corporation using nonlibrarian outsourcers, "What was so critical to us was that they would be aware of and were participating in the management of the whole information lifecycle" of the corporation.[10] How can corporate librarians reposition their services to be competitive in the face of such a challenge?

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This article discusses the predicament posed to librarians by the trend to outsource corporate information services. An analysis of corporate library services indicates that only those services that entail a case-by-case diagnosis of client needs can avert being outsourced.[11] An expanded concept of the information counselor model is proposed as a strategy for effecting such diagnos-

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tic-level services. This article also presents a framework for exploring potential services based on this service model. The educational/training, political, and administrative implications of such services have been discussed in another publication.[12]

Service "Outsourcability" and Client/Service Provider Interactions

Outsourcable services may be differentiated from nonoutsourcable services by their degrees of *service customization*—the design or repackaging (defined below) of new or existing information services to match the unique needs of clients. Such service customization assumes a case-by-case diagnosis and evaluation of client needs and information use, thereby implying extensive client/service provider or librarian interaction.

The levels of client/service provider interaction consist of (1) mail contact only; (2) on-site technology contact; (3) phone contact; (4) face-to-face contact with tight specifications; (5) face-to-face contact with loose specifications; and (6) face-to-face contact with total customization.[13] This matrix suggests a continuum ranging from mediated and impersonal (routine) contacts between clients and service providers (e.g., mail, technology, and phone contacts) to varying degrees of face-to-face and personalized interactions.

The potential for efficient and effective service provision also varies along this continuum. Although efficient service orientations focus on performing services with the least expenditure in resources, effective service orientations emphasize the attainment by clients of their goals and objectives. Brief and focused contacts with external subcontractors or outsourcers (mediated or face to face) might be efficient (i.e., fast and cost saving). However, it is unlikely that external service providers would understand and participate as fully in the "whole information lifecycle" of the corporation as in-house service providers. Thus, it is apparent that corporations that opt for outsourcing primarily to reduce costs might be trading service effectiveness for efficiency. As Levitt observed: "The fact that price differences are, prima facie, measurable becomes the usual, and usually false, basis for asserting their powerful primacy."[14]

On the other hand, services that involve face-to-face contact with clients may enable case-by-case diagnosis of needs, prescription, and evaluation of service use and impact. Moreover, in-house professionals who understand the environment, roles, and personal characteristics of clients could design and provide services that impact positively on client goals and strategies. However, face-to-face interactions with clients may be inefficient from the viewpoint of time and labor costs. For instance, face-to-face contacts might entail iterative and recursive interaction processes. Such services cannot be reduced to contractual specifications. Consequently, they are not amenable to automation or outsourcing. Because they potentially guarantee attainment of clients' goals, however, in the long run they might be more cost-effective than outsourced services.

Given the complexity and pace of change in the corporate environment, it is apparent that only customized services can avert being outsourced. The experi-

ence of information systems services provides an illustration. Transactional services such as the processing of payroll and accounting records, which entail none or at best routine interactions with clients, have been easily automated and outsourced. On the other hand, however, decision support systems, which entail extensive client/service provider interactions in a bid to customize planning, project evaluation, and policy analysis data to suit clients' needs, cannot be so readily automated and outsourced.[15]

A Model for Analyzing Corporate Library Services

In 1994 Greer, Agada, and Grover proposed a model for analyzing library services. This model identifies three categories of service type based on levels of client/service provider interactions: transactional (e.g., cataloging), reactive (e.g., direct-reference service), and diagnostic (e.g., information counseling).[16] This model is similar to Levitt's total product/service concept, which categorizes services development into generic, expected, augmented, and potential phases.[17] Contemporary corporate library services seem to emphasize features of the generic and expected services. Commercial cataloging and online databases, including the Internet, which require little or no client/service provider interactions, represent generic and expected library services that have been automated and outsourced. To avert being outsourced, the focus of corporate libraries needs to shift to the more differentiated augmented and potential service categories.

Augmented Services
Augmented services add value to generic and expected services through differentiation.

> Differentiation is not exhausted merely by giving the customer what he expects. What he expects may be aug-

mented by offering him more than what he thinks he needs or has become accustomed to expect.[18]

Corporate librarians may therefore voluntarily augment the "expected" features of their services by an ever-increasing bundle of "service satisfactions."[19] Such service satisfactions involve evaluating services by the degree or rate at which clients attain their goals, rather than by their access to relevant information resources.

The linkage of corporate library service use with client goals may be best attained through the diagnostic level of service. Diagnostic services entail a systematic, case-by-case *analysis* of the

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client's needs to determine "problem dimensions and information traits."[20] This is followed by a *prescription*, or recommendation, of such information as deemed appropriate for resolving the client's needs. Information is retrieved and customized, or repackaged, to suit the client's unique needs. The librarian subsequently monitors and evaluates the *implementation* or use of the prescribed information. Based on the outcome of the *evaluation*, a second round of diagnosis may initiate another cycle of services, until the information need is satisfactorily resolved. In the corporate environment, this entails the successful and timely completion of the client's task or project.

Such services may be best effected through information counseling. According to Carol C. Kuhlthau, information counseling provides a new kind of mediation in which the counselor "guides and supports the user, and offers encour-

agement, strategies, sources, sequence and redefinition through exploration and formulation in preparation for collection and resolution."[21] However, guidelines for translating these processes into practice are inadequate and framed by generic and expected service orientations. For example, service format and evaluation often are defined in terms of provision of access to a sequence of relevant documents for client perusal and use.[22]

Solution maps can be used to develop a macro-level view of clients' goals, objectives, and responsibilities, and to propose appropriate activities.

Such a stance is document fixated and assumes that existing documents anticipate the unique "problem dimensions and information traits" of every client. As Corey observed: "The form of a product is a variable, not a given in developing market strategy. Products are planned and developed to serve markets."[23] Consequently, potential corporate library services ought to include either the creation of new or the repackaging of existing services, information, and documents, as well as consultancy in any processes that facilitate client learning and ultimate attainment of goals.

Potential Service
Developments in information technology have educated corporate clients as to what is reasonable to expect of their library services. What used to be augmented features of corporate library services (e.g., creation of customized databases) now has become the norm, causing clients to seek differentiation elsewhere.

When a prospect no longer needs the help that converted him into a customer, he becomes free to shop around for things which he values

more than that help. Often, this is price.[24]

The challenge to cut costs through outsourcing information services requires that corporate librarians further differentiate their services under the changed conditions. An expanded information counseling model is suggested as a basis for developing a market franchise for a range of potential corporate information services.

Potential Information Counselor Services
As information experts, corporate librarians ought to service the "management of the whole information lifecycle" of the corporation—from creation, organization, and access to diffusion, application, and evaluation. Thus, corporate library services should be aimed at creating environments that facilitate client learning (i.e., the acquisition of requisite knowledge, skills, and attitudes to attain set goals). Such services ought to go beyond sequencing relevant documents for use to include managing and evaluating the use and impact of information. For example, counselors could consult on the effect on information use of personality and cognitive styles, group and individual roles, and the organizational environment. Such services would enhance the quality of problem-solving, task assignment, and project execution, as well as the management of group dynamics and innovation adaptation, for example.

To render such services, counselors need in-depth knowledge of clients and their tasks and work environments. The emergence of cross-functional project teams offers a forum in which corporate librarians may learn about and develop models of clients and their work cultures. As a team member, the counselor would serve as the interface between the corporate world of his or her clients and the world of information. Given the dynamism of both worlds today, this undertaking requires continuous learning on

	Planning	Design	Implementation	Managing/Evaluating
TABLE 1 **The Solution Map**				
Task objectives				
Task processes				
Requisite knowldege, skills, and attitudes				
Requisite information processes				

the part of corporate librarians. Writing about computerized interface agents in information retrieval, Negroponte observed that:

> the key element to agent-based systems is learning. It is not a matter of a questionnaire or a fixed profile. Agents must learn and develop over time, like human friends or assistants. It is not only acquisition of a model of you; it is using it in context.[25]

Using models of clients in context is the basis for diagnostic and customization services, which is discussed below.

Diagnostic and Customization Services

Models of corporate clients are shaped by their environments, roles, and personal characteristics (e.g., cognitive styles).[26] These three levels of analysis—environment, role, and cognitive style—influence the design of information services to varying degrees. Environment and role analyses, for instance, are requisites for designing new information services. Role analysis is the primary fo-

cus when the counselor seeks to customize information services to meet needs ascribed to positions (e.g., personnel administrators), whereas creating new or repackaging existing information to match the needs of an individual (personnel administrator) requires knowledge of his or her cognitive style. Several models exist for diagnosing needs through analyses of clients' roles and cognitive styles. The use of solution maps and the Learning Style Inventory to diagnose roles and cognitive styles are described below.

Role Diagnosis

Solution maps can be used to develop a macro-level view of clients' goals, objectives, and responsibilities, and to propose appropriate activities. They also enable charting corresponding information service requirements.[27] The solution map shown in table 1 identifies critical aspects of the project or task at hand, such as project objectives; task processes (e.g., intellectual and practical); requisite knowledge, skills, and attitudes; information needs (subject, context, perspective, etc.); and information processes (e.g., analy-

sis, synthesis, application, evaluation). These aspects are closely monitored to ensure their synchronization. The phases within which clients play their roles are listed on the top horizontal row of the model. For example, a project may entail planning, designing, implementing, and managing phases.[28]

Through extensive interviews, using appropriate strategies, the information counselor collects data to fill in the cells of the model. Such data might include: (1) the client's current challenges; (2) how the client wants things to be; (3) what will be affected by the desired changes; (4) what the client needs to know and do to effect the desired changes and activities; and (5) the individual and group capabilities necessary to meet the client's needs.[29]

The challenges and sequences of activities identified would be systematically interfaced with an information services inventory (from generic to potential services) as part of the client's solution plan.

A project involving adaptation of an innovation, for example, might require that the client play roles in the following sequence: (1) becoming aware of, and informed about, the innovation; (2) acquiring more knowledge about it; and (3) evaluating it and developing favorable or unfavorable attitudes about it. The process might terminate if the client does not perceive the innovation to be worthwhile. If, on the other hand, the client feels the innovation has potential benefits, additional roles would include (4) adopting the innovation on a trial or partial basis, and (5) fully adopting or rejecting it.[30] For each phase, the counselor would document the corresponding task objectives and processes, etc., in appropriate cells on the model. Thus, the solution map enables the counselor to appreciate the interim nature of each phase of the client's roles and attendant needs, thereby facilitating proactive services provision.

The map that evolves from such analysis would provide a detailed and accurate picture of the entire information life cycle of each project or task. Based on this picture, the counselor could recommend a series of treatments including workshops, observations, brainstorming sessions, readings (viewing and auditing), etc., to support the clients' needs at each phase of their tasks. An example of the sequence of documentary sources alone may consist of promotional brochures to create awareness; and state-of-the-art and impact analysis reviews to support the phases of acquisition of additional knowledge of, and attitude toward, the innovation, also undertaking initial evaluation. Technical and training handbooks would be ideal for trial or partial adaptation, whereas service maintenance and assessment manuals would support full adaptation of the innovation.

Individual differences among clients require that the counselor repackage information to suit each client. For example, the roles played by different clients in the innovation-adaptation process (e.g., change agents, gatekeepers, or followers) create different information needs. Knowledge of clients' pace of innovation adaptation also dictates different paces of sequencing appropriate support services. Clients exhibiting traits of early adopters, for instance, would move relatively quickly through the process and thereby require more proactive information support than late adopters and laggards. The exact format of these sources is determined by clients' cognitive or information-processing styles.

Analysis of Cognitive Styles
Cognitive styles reflect individuals' tendencies to adopt particular strategies in the perception and processing of information. Individuals who differ in their cognitive styles approach similar information-processing situations in different ways.[31] Cognitive styles also are said to correlate with learning and problem-

solving styles.[32] Knowledge of clients' cognitive styles could therefore be used by counselors to vary the format of recommended information, just as physicians vary prescriptions based on knowledge of a patient's allergies or family history.

The Learning Style Inventory by David Kolb is one of many instruments that assess cognitive style.[33] Although all learning and information-processing implicate the four styles, individuals are said to emphasize one or two preferences as a result of innate or socialized traits. Individuals who take in information through a combination of concrete experience and active experimentation are called *accommodators*. *Divergers* are those who combine concrete experience with reflective observation, whereas *assimilators* are said to combine reflective observation with abstract conceptualization. *Convergers* work best when they combine abstract conceptualization with active experimentation.

The combined knowledge of clients' roles and cognitive styles provides specifications for repackaging information.

Knowledge of these preferences enables the counselor to locate or design information in the formats preferred by clients. For example, accommodators are said to be intuitive and goal oriented and to prefer hands-on and vicarious experiences such as field trips, demonstrations, modeling, interviews, simulations, case studies, etc. Divergers like to seek alternative ideas and new patterns, discrepancies, and problems. Thus, they prefer reading journals and reflective papers, and engaging in group discussions and brainstorming sessions. Assimilators are deductive thinkers who can formulate theories from vast and disparate ideas. Thus, they are comfortable with textual and print materials, programmed instruction, lectures, and film. Convergers are quick to make decisions and connections, and prefer to work individually, trying out problem-solving strategies and creative projects.

These styles also represent stages in the cycle of problem-solving: problem and goal analysis (concrete experience); explorations (reflective observation); evaluation of possible solutions and consequences (abstract conceptualization); and selection, execution, and evaluation of solutions (active experimentation).[34] By implication, clients may be more skilled at some stages of the problem-solving process than at others. Based on identified preferences of clients, for instance, the corporate librarian as information counselor could help members appreciate and adapt effective information use and problem-solving strategies to match their styles. Counselors also could advise on the composition of work teams and the assignment of tasks and strategies for their execution. Such services ensure that team members have complementary or mutually reinforcing cognitive and problem-solving styles.

Repackaging of Information
When information does not exist in the intellectual and physical formats appropriate to a client's cognitive style, the counselor might need to create new sources or repackage existing ones to match the client's needs. The combined knowledge of clients' roles and cognitive styles provides specifications for repackaging information. *Information repackaging* entails adding value to the intellectual and physical attributes of information packages to enhance understanding and utility in the context of clients' needs.[35] A related concept in the library and information science literature is information consolidation. According to Saracevic, *information consolidation* is:

> public knowledge specifically selected, analyzed, evaluated, and possibly restructured and repack-

aged for the purpose of serving some of the immediate decisions, problems and information needs of a defined clientele or social group.[36]

Repackaging the intellectual contents of information entails information analysis and synthesis. *Information analysis* involves identifying and evaluating component units and the structural relationships of source information or documents. *Information synthesis*, on the other hand, is the editing, repurposing, merging, and restructuring of different units of source information or documents into one or two units to convey new meanings, focus, purposes, or perspectives. Repackaging the physical contents of information entails the choice and combination of symbols, channel, and media formats to create a message. For example, the information on this page is conveyed by alphabetic symbols viewed through the visual channel and held by the paper medium. Different coding systems regulate the combination order of the symbol, channel, and media elements of a message to effect changes in meaning, perspective, or emotional impact.

By applying the knowledge of information psychology, especially media theories, packages may be designed to complement the cognitive problem-solving styles of clients. The counselor could, for example, apply a variety of techniques to facilitate reading, comprehension, and retention to suit clients' subject knowledge or reading skills.

Sometimes repackaging may entail transforming the symbol, channel, and medium elements of information. For instance, a lengthy annual report in printed form could be repackaged into a brief audiotaped executive summary the client could listen to while driving to work. Such repackaging would necessitate transforming alphabetic symbols to word symbols; light (visual) waves to sound waves (channel); and paper to a celluloid-based medium. With the advent of the Inter-

net, for example, counselors could create Intranet files in multimedia formats by integrating and repackaging external information with the corporate, project, and personal archives to reflect their clients' work culture, language, and habits.

The products of repackaging range from customized access tools (e.g., databases, indexes, and abstracts) and synthesized representational sources (e.g., translations, state-of-the-art reviews and manuals) to interpretive and evaluative services (e.g., evaluative summaries and executive briefings). While the counselor diagnoses needs and prescribes information to meet them, other library staff could undertake the design of the prescribed information sources under his or her supervision. Interpretive and evaluative services, in particular, ought to be closely supervised by the counselor because he or she, more than other library staff, has a close working knowledge of the client's goals, roles, cognitive styles, values, perspectives, etc. Such role divisions within the corporate library call for the adoption of a project-based team approach to service design and management.

Interpretive and evaluative services such as executive briefings may be presented orally in a one-on-one discussion format to match the client's cognitive style. Executive briefings may highlight key issues in any phase of a project and could require that the counselor evaluate and rank decision options based on the client's goals, priorities, resources, political and economic exigencies, etc. Such a level of repackaging implies that the counselor is an "insider" in the corporation and shares in its specialized knowledge, goals, and strategies. It also calls for a high level of client/counselor trust and confidence, akin to that between collaborative peers.

By implication, a counselor who renders interpretive and evaluative repackaging services to top executives ought to be of comparable rank, such as vice presi-

dent in charge of information services or chief information officer of the organization. Information counselors who attain such status in their organizations are likely to succeed in streamlining their library services with the core functions of the corporation and in overcoming the challenge of outsourcing.

Conclusion

Corporate libraries whose functions emphasize transactional and reactive services face the threat of being outsourced. This demands that corporate librarianship be redefined to emphasize those services that pose the least potential for outsourcing. The increased sophistication in information skills among corporate clients also calls for corporate librarians to differentiate their skills as information experts. Such differentiation must go beyond the location and provision of access to a sequence of relevant documents for client use.

The integration of information-counseling concepts with those of diagnostic and repackaging services offers a model for redefining corporate librarianship. Services based on this information counselor model would include the creation of new and repackaging of existing

> Such differentiation must go beyond the location and provision of access to a sequence of relevant documents for client use.

documents, as well as consulting on the effective use of information in a variety of formats as dictated by the environment, roles, and cognitive styles of clients. Such services would integrate the corporate library functions with the mission, goals, and strategies of the corporation and have a direct impact on its bottom line. Consequently, information counseling with its extended client/librarian interactions might, in effect, be more cost-effective than outsourcing alternatives.

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