



Setting Yourself Up for Success

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Setting the Stage

- “If you don’t know where you are going, you’ll end up someplace else.” Yogi Berra
- Consider the businesslike approach
- What is a marketplace, anyway? Principles of marketing

Market Research (a.k.a. a needs assessment)

When

- Idea for new product or service
- Strategic or long term plan
- Required – example MLA Standards for Hospital Libraries calls for ongoing assessment of knowledge based information needs
<http://www.ncbi.nlm.nih.gov/pmc/articles/PMC2268237/>

What	<ul style="list-style-type: none"> • Analyze your market or market segment • What do they need and want? What do they not want? • What problems or challenges do they face in information management or retrieval?
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Needs Assessment Process	
First things first	<ul style="list-style-type: none"> • How will you use this information? • Will you do it yourself or seek outside expertise?
Gather information	<ul style="list-style-type: none"> • “You can observe a lot just by watching.” Yogi Berra – or in this case “asking”. • Who to include (inside the organization and out; existing users; non-users) • What to ask and how to ask it
Analyze findings	<ul style="list-style-type: none"> • Go in knowing what you want to know, but be prepared to listen and learn • Circle back to assess your findings and conclusions

	<ul style="list-style-type: none"> • What did you learn and what does it mean?
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Managing Outcomes	
Benefits	<ul style="list-style-type: none"> • Information on which to base decisions • Customers feel heard • You've raised the profile of the library • Empathy – understanding the client's perspective
Align with enterprise goals	<ul style="list-style-type: none"> • Pay attention to buzz words • Study internal documents – mission statement, letter to shareholders, strategic plan • Present to management
Developing recommendations	<ul style="list-style-type: none"> • Decide how to align findings with goals and with budget • Remember, "The future ain't what it used to be." Yogi Berra

Resources

“Planning for Knowledge Management: Conducting a Knowledge Assessment”, in *Knowledge Management Practice in Organizations: A View from Inside*. Cynthia Shamel, IGI Global Publishing 2014. Download the chapter at <http://www.shamelinfo.com/publications>

“Maximize Your Return on Information Investments with an Information Audit”. Cynthia Shamel *FUMSI Newsletter*, June 2012. Abstract at <http://web.freepint.com/go/sub/article/68771>

Context for Assessment and Outcome Evaluation in Librarianship. Anne Woodsworth and W. David Penniman, eds. v.35, Emerald Group Publishing Limited, 2012.

Special Issue: Needs Assessment: Trends and a View Toward the Future, *New Directions for Evaluation*, James W. Altschuld and Ryan Watkins, eds. v.2014 n.144, Wiley Periodicals.

Speaker Profile and Contact Information

Cindy’s business has expanded since 1998 from research and analysis to helping meet the demand for knowledge management solutions. As a consultant, Cindy has proven abilities to identify challenges and propose creative solutions through interaction and collaboration. Her understanding of organizational dynamics combined with tact and leadership skills leads to workable solutions with successful implementation outcomes. Cindy is a dedicated leader. She served as SLA San Diego Chapter President in 2009 and AIIP President in 2003-2004. Cindy was honored by AIIP with the Sue Rugge Memorial Award for mentoring in 2006.

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