

## II. INFORMATION NEEDS ASSESSMENT: A TOP-DOWN APPROACH

The challenge: Know thy market.

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- Your market has many constituencies, with many distinct information needs.
- With changes in the marketplace occurring daily, the process of knowing your market must be ongoing.
- The librarian is no longer the only gatekeeper of information.
- Do you know who your competitors are?

## II. INFORMATION NEEDS ASSESSMENT: A TOP-DOWN APPROACH

### *A planned and systematic approach*

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**1.0 The information needs assessment process is a planned, systematic approach to determining the information needs of each distinct customer group. Its purpose is to help you develop information products targeted specifically to each group and need.**

Understanding the function of each person and group within your user community and how these individuals and groups interact will enable you to plan the types of information products and services that will be most useful to them.

Information services are no different than any other type of product one might sell. However, an intense planning effort is required to develop those products which will be most useful to your market; to target the products carefully, so that your audience will be receptive to them: and to choose marketing techniques which will convince your customers that the products are worth purchasing and using.

**2.0 What you once saw as a captive audience for your information products or services no longer exists. You now face increased competition from information vendors who are entering what you once considered your domain: The end-user community within your organization.**

It's no longer guaranteed that your customers will use whatever information products and services you offer them. Shifting budget priorities are causing your customers to rethink the information products and services they purchase from you.

At one time you may have been able to give your customers whatever information you had on-hand; today, you must concentrate on providing them with the information they need, the information which will make a difference in their ability to function and profit.

**3.0 It is crucial to understand your customers and why they require information. Each customer has his own information requirements and, while the same information may be needed by more than one customer, it may be used in entirely different ways by each.**

Not only do you need to know what information is required by each customer, but why it is needed. What purpose does the information serve? If you understand how information is being used, you will be able to develop information products and services which respond to the needs of your clients.

"A library program built around the information needs of potential patrons, as they perceive those needs and wants, becomes a highly valued

resource in the community.” [See Julie A. C. Virgo, “A Marketing Approach to Identifying Library Services,” page 27, in *Marketing Public Library Services*, Darlene E. Weingand, ed.]

## *The world around you*

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### **1.0 The world in which your organization exists is one of change. Keeping abreast of changes in the environment is critical to the success of any organization.**

Librarians play a key role in this process by scanning the environment to identify strong and weak signals of change: Economic, political, social and technological.

### **2.0 Each group within an organization will be trying to keep pace with their counterparts in competitive organizations.**

In a highly competitive environment, monitoring trends--that is, what has been said about your organization, the industry in which it operates, the markets it serves and individual customers within those markets--and informing others as to significant changes in the environment takes on an increased importance.

### **3.0 An industry and competitive analysis project is based on information and involves many groups within an organization: Product design engineers, marketers and salespersons, and strategic planners.**

The contribution which can be made by the librarian in the formalization of such a project is enormous: Information, access to resources, familiarity with the concepts and technologies to be employed and working relationship with the groups involved in the project.

## **1 .O Determining an organization's goals and strategies**

**1.1** Understanding an organization's goals is one of the most important aspects of assessing its information needs. In the past, top management did not articulate their organization's objectives. Today's business managers are beginning to realize how important it is to establish goals and make all levels of management aware of them.

**1.2** The information products and services you develop should support the goals and objectives of your organization or community.

**1.3** The strategies your organization has formulated in order to achieve its goals should be made clear to you so that you can provide appropriate products and services to support them. Shifts in focus or emphasis will affect the information required by the organization. Familiarize yourself with your organization's goals and strategies but be aware that some organizations change strategies mid-stream. Try to ascertain how long the present strategy has been in place and how frequently your organization changes its strategies so that you can develop information products and services which are flexible.

**1.4** In today's competitive environment, strategic management issues take precedence over the tactical. Accordingly, those groups within the organization most closely tied to strategic and long-term planning functions have gained in importance as well.

While information products and services must be developed for all groups within an organization, it makes sense to target more of your energies in the areas which will make the most impact on the organization's future. The information services which support applications of high value to the organization--that is, those where the business payoff is greatest--will be more highly valued than others.

**1.5** Identify the major functions within your organization and the departments most involved in performing these critical functions. How do these groups fit into the overall structure of the organization?

Understanding corporate hierarchies and how individuals and departments relate to each other will help you plan information products and services which serve the organization as opposed to individuals. Offering products across departmental lines will foster the sharing and exchange of information, thereby increasing the efficiency of the organization and leading to an increase in profitability.

1.6 When developing and marketing your information products and services, you must be aware of the corporate culture of your organization.

The type of products you develop, the user groups or departments you target, and the way in which you promote them will be dependent upon a correct reading of how receptive your customers will be to your products and services.

The individual styles of senior executives will also play a role in the success and failure of your products. Don't forget to take them into account when formulating your marketing plan.

## **2.0 Market segmentation**

Since every community is composed of separate and distinct user groups, you must also determine the functions and activities of each identifiable group within it. Like the organization as a whole, you must ascertain the mission of each group and determine the role it plays within the organization. Try to figure out what the members of the group believe to be its Critical Success Factors as well as what management considers the Critical Success Factors for the department.

Targeting your information products to precisely those aspects of a group's activities which determine their success will help the individual group as well as the entire organization achieve its goals.

2.1 Each user group has a different, identifiable force which drives it. For example, customer issues are the driving force of a sales department, and technology drives the development department of an electronics firm. If you know the driving force, you can market your product or service properly. The identical product might be marketed to one department on the basis that it will increase productivity while another user group will be sold on it because it will reduce costs.

Successful product development is of no value unless your efforts to market the product are also successful. Your marketing effort is directly dependent on an accurate assessment of each group's driving force.

2.2 Understand precisely what information is critical to each department.

All groups require technical, tactical and strategic information. While technical information will increase a department's productivity and tactical information will be useful for problem-solving, strategic information is essential for sound decision-making.

Know that decisions will have to be made, whether you have contributed to the process or not. Once you understand the type of decisions made by each department, you will be able to develop information products and services which will help them make better, more informed decisions.

### **3.0 Competition: All around us**

Looking at the world around you means that you concern yourself not only with your individual organization but what is happening in the information industry.

You are running a business and, just like any other business, you need to perform a competitor analysis so that you can tailor, design, develop and promote your services accordingly. It is essential that you understand your current and potential competition. Only then will you be able to determine those areas which have information needs not being met by anyone else.

### **4.0 Internal competition**

More and more end-users are developing information products for their own use and the use of others within their department. These products are potential competitors to your own if they are marketed to other groups within the organization, One way to avoid this problem is to understand why the product was developed in the first place. What need was not being met by the library?

4.1 Try to become a partner in all such efforts by helping in the production of these information services or by making suggestions to improve them. Resign yourself to the fact that some information products will originate from outside the library. However, the more involved you are with groups developing these information products, the more likely that you will be consulted before the products have been completed.

4.2 This increased visibility can only be helpful to you and your library. Perhaps next time, they will come to you for the information they need, rather than developing the information product on their own.

### **5.0 External competition**

Know what information products and services are being offered directly to executives from outside the organization and determine why they might have been acquired.

Compare these products with your own-content, technology, cost, marketing strategy. How do they differ from the products and services you are providing or are able to provide?

Determine whether it is possible to offer a similar product for less money or a product with some added-value factor: for example, including appropriate company or organization information to add value to the information contained in the product you want to sell.

**1.0 One of the most useful ways to learn what information is required by your organization is to conduct a survey of your market, including both current and potential customers.**

While questionnaires may work for evaluating information products already in use, they are not as successful in assessing the information needs of an organization. A more thorough method of performing a comprehensive information audit is to begin by conducting interviews with each distinct market segment and following these group meetings with one-on-one interviews with the individual members of the group.

**2.0 Try to keep your group meetings creative to foster the free flow of ideas.**

Ask members to point to instances where information has been particularly useful, as well as instances where the lack of information has hampered their ability to function effectively. What questions have they tried to answer but could not? What answers were particularly time consuming and frustrating to obtain?

**3.0 When meeting with individuals, try to gauge where each one fits in the department's organization.**

What tasks does each individual perform **that allow the department** to function effectively? During the group interview you will have discussed how information enables the department to achieve its strategic objectives. Now, you must get the individual members of the group to think about how information contributes to their everyday routine. For individuals, the concern is usually the application of information to increase their productivity and make their work day a bit easier.

Seek suggestions as to where improvements might be made in the type of information retrieved and applied. People may be less inhibited in a personal interview than they were in the group situation, when their boss might have been present. Also, they will have met you at least one time prior to this interview-at the departmental meeting-and may be more at ease in speaking freely.

A list of sample questions which can be used during these interviews can be found at the end of this chapter.

**4.0 For each identifiable user group, department or business unit, define what functions are performed and how they are performed.**

What are the goals of the group? Think about how the library can help the group achieve its objectives.

Each group's information needs assessment should be summarized into an easily-reviewed format for future use. **Use a** modified outline format with bullets and subheads to structure the data.

**1 .0 Identify the user group or department and describe what it does.**

Try to get a sense of how well it performs the tasks assigned to it. Could better, more timely information improve the way the department functions?

1 .1 What is its role within the organization, corporation, or community?

1.2 What products and services does it provide and to whom? What clients or markets does it serve?

1.3 What resources does it manage? Try to ascertain the group's budget and how allocations for special projects are determined.

Could an information product or service designed especially for this group be partially subsidized by it?

**2.0 Determine the various activities of each unit and identify the procedures to gather and use information for each activity of each unit.**

2.1 What information does the unit use? What data is required for the successful management of the department?

2.2 Where does that information come from? These sources are your competitors and should be the subject of further analysis.

2.3 What information does this group or department produce?

2.4 To whom is that information sent?

Determine the frequency of specific information usage or production and any critical timing associated with it. For instance, does the department require information in order to produce a report on the first of each month?

**3.0 Once you have looked at several individual groups within the organization, determine how they relate to each other functionally within the organization.**

Does the group work with one particular department on a regular basis? Has the group participated in any joint efforts with other groups in the past?

#### **4.0 Track the type and source of information flowing into the organization and through it, identifying the information users.**

Are you able to recommend a logical path for the flow of information through the organization, taking into account special concerns such as organizational hierarchies, business locations and functions, and critical timing factors?

4.1 Note pockets of information where information is stored throughout the organization. These information storage areas may or may not come under your jurisdiction. This inventory of information that exists outside the library's domain will be critical as you decide which information products to develop.

#### **5.0 Analyze whether there is duplication of effort and identify sources of complementary information.**

5.1 Can available information be shared or exchanged? Think about how the library might facilitate information transfer among the various groups of users.

5.2 You will improve management control over expenditures for all types of information when you identify user groups that have similar requirements and recommend that they share information. Improving management control over expenditure for information ought to be a measure of your success.

### *A needs assessment checklist*

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After completing the Information Needs Assessment, ask yourself the following questions:

- Have you identified the information needs of your organization as a whole as well as individual groups within the organization?
- Do you have a clear picture of how information is obtained, managed and used throughout the organization?
- Can you identify any problem areas? Do these present an opportunity for you?

#### **1.0 Choose a method of assessing the organization's information needs which best suits its structure and culture and your capabilities.**

The more comfortable you are with the process, the easier it will be. Remember to keep the lines of communication open. Listen to what your customers are telling you about their needs.

## **2.0 Time management is an important concept.**

Try to schedule your important meetings in prime time, whenever that might be for you. This is when you will be at your best, when you feel most energetic and ready to take on new challenges. If you are not a morning person, use the morning to work on your own and save all of your interviews and group meetings for the PM.

## **3.0 No organization is static, and an information manager must be prepared for change.**

The assessment of information needs is not a one-shot deal but a process by which you can determine the information needs of an organization at a specific point in time. Since nothing remains the same forever, the organization must be monitored for any changes that will affect its information needs and you must respond to those changes in a deliberate and timely manner.

## **4.0 Know your resources, both those within your organization and those external to it.**

Keep on top of information products and services being offered from traditional information suppliers as well as new entrants into the market. Use the information you have gathered in the needs assessment process to position yourself and your library at the center of information activity within your organization.

## **The opportunity**

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- Information can eliminate the confusion caused by a rapidly changing environment.
- Find out what kinds of information people want and need, and then deliver it.
- Turn your competitors into allies.

One result of our Needs Assessment is the discovery that many departments spend an inordinate amount of time on competitor analysis. There is much duplication of effort and little coordination between groups. All groups agree that an accurate reading of the competition is essential for developing our firm's strategy. Could there be an opportunity for us to develop a better information product which addresses the competitor issue?

1. What business are you in? What are the objectives in your area and how do they relate to the objectives of the organization as a whole?
2. What is your area of responsibility and how does it contribute to achieving the goals of the organization?
3. What major changes are anticipated in your area in the next few months? Year? Years? How does this differ from your responsibilities and contributions in the past?
4. In past situations, of what value would better, more timely information have been? Give an example.
5. What type of information influences your area? What kind of data is required for the department's day-to-day operation? What kind of information would help you manage the area more effectively?
6. How are you currently using information resources and technologies to support your department's administrative functions? To achieve your company's strategic objectives?
7. What is the most useful information you receive on a regular basis? From whom does it come and why is it so important to your operation? If you could recommend one improvement in the content and format of this information, what would it be?
8. If you could have one bit of information to help you do your job, what would it be? If your fondest information wishes could come true, what information would you seek to obtain on a regular basis? What type of information would make the most impact on your operation?
9. As a rule, where do you go to find the information you require? In general, how satisfied are you with the results?
10. How might technology—for example, communications, computers or electronic mail—assist you in meeting your department's objectives? How might it ease your individual workload or increase your department's productivity? (Try to give a few suggestions of your own.)
11. Are you aware of the value of the information to which you have access? Could it be useful to others in your organization?
12. Do you share or exchange information with other departments often, sometimes, or never?
13. What are you spending on information resources? On technology? Are you aware of your department's expenditures in this area vis-a-vis other departments in your company? Your competitors?
14. Rate your past efforts to plan for obtaining the information you require. Do you plan ahead or is it always a fire drill?
15. How well do you manage information once you obtain it? Give an example of past mismanagement of information, if applicable.

16. What opportunities do you see for improving the effectiveness and productivity of your operations through the use of information resources and technologies? Can you make similar recommendations for the organization as a whole?
17. How might information improve the functioning of your operation and help to achieve success in your strategies? Would more timely information enable you to make better decisions?
18. How might the library and its expert staff help you obtain and organize information which will enable you to accomplish your business goals?
19. How do you stay current about events happening in your industry?

**NOTE:** These questions have been adapted from those used by informationsystems professionals to determine an organization's competitor installation requirements as well as from strategic and business planners.