

Meeting Report: You Want What? Effective business research process, principles and practices

UKeiG Course Held On 7th November 2007 At CILIP, London

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The course leader was Jill Fenton. She is the Founder and a Director of [Fenton Research Ltd](#), a London-based research company.

Roles And Skills For The Business Information Professional

This was the original title, but Jill had noted that participants were from a wide range of sectors. She adapted her talk to describe how, while there is considerable diversity between the particular roles and tasks in different sectors, there are also many similarities. These include the importance of good 'soft' skills, such as communication skills. Relationship management also relies on good interpersonal skills.

Business Research Process

Jill has developed an effective three-step process that she shared with us.

1. Client Interview

The client¹ (reference) interview is absolutely crucial to the success of the search. There are a wide range of possible questions, and it was very useful to be given a list under several headings. These include: project scope, description of the search, the deadline, format and deliverables, and sources the client can suggest or use themselves.

¹ I have used the word 'client' in this report, but it could also stand for other terms, for example enquirers, readers, users, or customers.

We went through examples and exercises around the importance of using open-ended questions in the client interview. For example, they can help to clarify unclear or ambiguous search requests. Summarising what was understood as the search request should be done at the end of the call, and described clearly in an e-mail sent in confirmation.

2. Search

Planning which sources to use requires subject expertise in the relevant area. We should always be on the look-out for new information and initiatives relevant to our work. The other expertise needed is an in-depth knowledge of searching tools and techniques. The discussion of this point included Jill's experience phoning agencies or publishers and asking for help. This could be for general background, direct provision of information, or suggestions for other sources. This wasn't something most of us had tried, and many felt rather wary of this technique. However, Jill pointed out that if put diplomatically it can lead to very useful information. And nothing is lost if they say no!

3. Delivery

In the format and to the deadline agreed. It is essential to include full details of how the search was done. Feedback should always be sought after the search has been delivered, with the aim of improving searching in the future. It also provides evidence that may be used in service evaluation. At the same time, the fact that you are actively seeking feedback can add to the user's perspective of the service.

Opportunities To Add Value

These can occur at any stage of the process, for example:

- Searching a wider range of sources, or in more depth.
- Summarising/commentary (if you have the necessary expertise), rather than simply presenting data.
- Additional suggestions and information at the time and/or sending new relevant information to a project after a search has been performed.
- Providing the results as a PDF report can make a very good impression. Adding protection status to it also makes the report more secure from unauthorised amendments.

Approaches to Challenging Situations

In the second part of the seminar, we used exercises to explore practical solutions to problems that can occur in our work with clients. These included deadlines, capacity, or difficult behaviour:

- Our professional skills must include expertise in planning, prioritising and other aspects of time management. We should be confident in making and explaining our decisions on what is an achievable deadline or demand. Negotiation skills can help reach a solution.
- There will be times when we do not have the capacity to do all the work clients want done, and to their deadlines. It can be helpful to give those affected specific information that explains the situation, such as that there is already a queue of three other searches that will be done in turn (if that is how work is planned).
- Jill gave a striking example of how she dealt with a client insistent that his search was done before those of colleagues who had already put in requests. She told him that she would only do the search if he went and negotiated direct with those colleagues – which he did!

Jill then organised a practical exercise that demonstrated how our work can involve rapid and often unpredictable changes to events and demands. This requires flexibility, and the ability to constantly reassess priorities and plans. She also explained how the benefits of good relationship management include reducing the risk of problems arising, and makes it easier to resolve any that do occur.

The course was full of practical tools and ideas that I will find useful. It was also a reminder of the need to ensure that our professional skills and practice are always to a high standard. We also need to keep up-to-date, in our subject area and in information retrieval.

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