



Leading Strategic Information Initiatives

A Quantum² e-book for Information Professionals





Leading Strategic Information Initiatives

Contents

1. Introduction
2. Think Big, Add Value *by Sue Henczel*
3. The Art of Becoming a Corporate Information Strategist *by Beth Cody*
4. Winning in the Boardroom *by Donna Scheeder*
5. Conclusion
6. Selected Resources

It is no news to say that we all exist in a business environment characterized by constant change and fiercely competitive global markets.

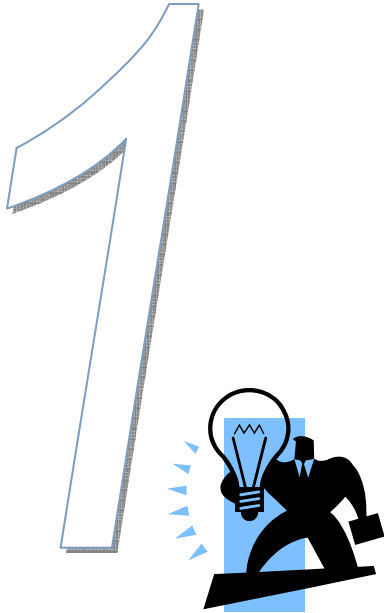
As information professionals, we have opportunities to succeed in this changing environment by displaying imagination, pragmatism, innovation, flexibility and most importantly, a strategic perspective.

In this e-book, information professionals share their experiences in connecting with the organization's strategic objectives. Their examples may spark ideas to help your quest to develop strategic information initiatives in your own organization.

*In “**Think Big, Add Value**,” **Sue Henczel** offers insights from a workshop that connects traditional LIS skills to the business competencies needed in today’s bottom-line culture..*

***Beth Cody**, in “**The Art of Becoming a Corporate Information Strategist**,” interviews corporate library managers including **Eugenie Prime** and **Cindy Hill**, who have made the leap to strategic roles.*

*“**Winning in the Boardroom**,” summarizes an SLA Conference presentation by **Donna Scheeder** that provides tips for communicating with upper levels of the organization.*



Introduction

On a global scale, corporate libraries are being downsized and closed at a staggering rate...



and we must ask ourselves why this is happening at a time when information is seen as the most valuable asset that an organization can have. It seems that, while information has value for an organization, from the perspective of many a CEO or managing director a library does not.

While corporate librarians have become 'Information Managers' or 'Chief Knowledge Officers', many are still heavily focused on managing a physical collection, yet the information that adds value and contributes to an organization's success is rarely acquired from books.

Think Big, Add Value

If we are to take our rightful place as information experts in the business environment, we must **let go of our traditional roles and services** and investigate the real workings of our organization: the business that it is in, what people do, how they work and what information they need to do their jobs better.

The competencies that we have as librarians are clearly and easily transferable to the business environment. They can be used to position an information service strategically and to develop products and services that add value to the work of our clients.



The benefit of becoming *‘organizationally aligned’* and *‘client focused’* is that we have the opportunity to become an integral part of the organization.

If we package and promote products and services in a way that is attractive to existing and potential clients we can persuade clients that our services are better than those offered by any of our competitors. And, we can perform in such a way that we consistently exceed the expectations of our clients

We must help our clients to have faith in our ability to deliver, and trust us to give them correct, authoritative and context relevant information.

Think Big, Add Value

Some final thoughts about being client focused:

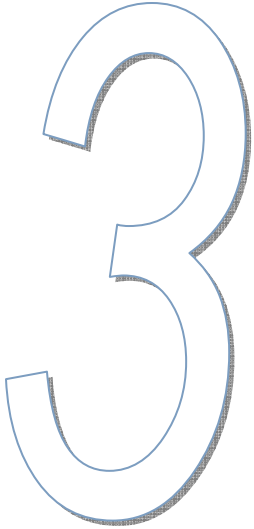


- Think ‘organization’ rather than ‘library’ – see the big picture.
- Be busy, but be busy doing things that make a difference and add value.
- Market yourself and not the library.
- If there’s no perceived value in the eyes of the client, there’s no added value for the organization.
- Get out of the library and become an active member of the organization – seek strategic partnerships within the organization and outside.
- Get rid of the visible collection – even if only temporarily – so you are not just seen as the keeper of books.
- Ask existing and potential clients what they need – and listen to what they say.
- Never underestimate your skills – accept thanks graciously and actively solicit testimonials and referrals.

About the Author: Sue Henczel is the Business Development Manager for CAVAL, an academic library cooperative in Melbourne, Australia. After many years in special and academic libraries, she now manages local, state and national projects in Australia. Through CAVAL, and her own company INFASE Solutions, she conducts regular workshops and provides consultancy services to organizations in Australia, New Zealand and the US.

Think Big, Add Value

This excerpt from “The Art of Becoming a Corporate Information Strategist,” discusses the skills and competencies needed in effecting change.*



Interviews with corporate information professionals (IPs), supplemented with research, show that while IPs are included on knowledge management and competitive intelligence teams, it is seldom at a strategic level. Rather, the typical reason for their inclusion is **to implement the plan**, after the weightier decisions have already been made. While IPs’ core skills of finding and sharing make them extremely valuable in knowledge management and competitive intelligence, these skills do not necessarily enhance their ability to participate at higher, strategic levels.

In order for an IP to become a corporate information strategist and a key player in this arena, a paradigm shift must take place. This may mean leaving the comfort of the well-established norm—the sharing traditions of the library—and venturing into new territory to learn the skills and processes, the culture and techniques that make up the corporate world.

The Art of Becoming a Corporate Information Strategist

*To read the entire article by Beth Cody, visit <http://quantum.dialog.com/whitepapers>

Accepted decision-making processes of business, such as being more decisive in group settings and suggesting solutions when communicating problems, are good habits to develop.



Skills in presenting, marketing, persuasion, entrepreneurship and modern management techniques can be learned. However, it is also important for IPs to seek champions within their organizations, preferably outside the narrow confines of the information center. They should provide services and thoughtfully written pieces beyond the daily requests made of the information center, on topics important to the organization, to show a library-driven strategic agenda and a certain willingness to take risks.

A full understanding of the organization with a *focus on the enterprise as a whole* is a helpful shift in thinking that leads to being able to produce a more strategic perception of the information professional.

The Art of Becoming a Corporate Information Strategist

A Business Person First: Understanding the Organization

...the most practical place for this type of learning is on the job, at any career stage, with the aid of an open mind.

“**Information professionals are underutilized in strategic roles,**” says **Lucy Lettis**, formerly a director of business intelligence for Andersen, and then a senior vice president of Marsh, Inc. With more than 25 years of experience in information services, Lettis is inspirational and somewhat rare in that she reached the peak of strategic roles for IPs in both knowledge management and competitive intelligence areas. In 1999, she was the first IP to become a principal of the Andersen partnership, an honor in the corporate world where IPs are seldom made managing directors. She has held positions such as director of the business information network for Andersen and director of business intelligence.

Lettis moved into these strategic roles by learning on the job. She gained expertise by being in tune with her environment and by understanding her firm’s culture. “I think information professionals would be doing themselves a service if they tried to absorb that, **in order to rise in an organization, they need to figure out what that culture is. Adapting one’s image is very important.** That is the world that we live in. They need to polish up their image, talk in a corporate way, behave in a corporate way, and not deny the reality of the workplace,” claims the ever-practical Lettis.



The Art of Becoming a Corporate Information Strategist

Sandra Hirsh, an information research consultant who was hired to begin the Information Research Program at Hewlett-Packard (HP) in Palo Alto, Calif. endorses Lettis' views, **"This was a huge change for me--I needed to understand corporate strategies."** Hirsh earned a Ph.D. in library and information science and was a professor at the University of Arizona library school prior to joining HP. Coming from the academic world, her new role working on research processes, or as she terms it, "research about research" required a big adjustment.

And **Michael Koenig**, dean of the Palmer School of Library and Information Science at Long Island University in New York and an expert on knowledge management, concurs, **"Corporate librarians have to think in a different mold... about loyalty to the corporation."** This is in contrast to the historical culture of the librarian, a culture of sharing.

Nigel Oxbrow of TFPL, in an article based on an extensive international research project that he presented at the Special Libraries Association Annual Conference in June 2000, confirms these opinions:

"To thrive in a knowledge environment, information professionals must, among other things, understand their organization, its strategies, its challenges, and where knowledge and information can add value."

(Skills and Competencies to Succeed in a Knowledge Economy, Nigel Oxbrow, Information Outlook, October 2000).

The Art of Becoming a Corporate Information Strategist

Mindsets and Decision Making

Shorter term focus is needed in today's business because of the rapid pace of change. Some executives say that planning as far out as five years is too long in many cases.



Strategic thinking has to do with understanding the big picture. It is about doing the right things, not just doing things right.

A more formal definition from the *Portable MBA Desk Reference (Portable MBA Desk Reference, An Essential Business Companion, Nitin Nohria, editorial director, 2nd Ed.)* is that strategic planning “involves actions that lead to the definition of a company’s mission, the formulation of its goals, and the development of the specific strategies that will be implemented to meet those goals.” It requires “decisions by managers at all levels” and “focuses on the long-term, although these days it increasingly focuses on both the short-term and the long-term.”

The ability to make decisions is key to being involved at the strategic level. There is risk at this level because decision-making necessarily involves taking responsibility for one's decisions. An undervalued capability associated with making decisions is being able to decide and go forward. By the time perfection in researching and considering an issue has been completed, the rest of the world has moved on, making the decision irrelevant.

“Information professionals are not asked to be decisive,” comments **Roberta Shaffer**, Executive Director of FLICC and FEDLINK, and champion of the information professional in business. “They are asked to be objective. They tend to be perfectionists, and not risk takers.” Acquiring decision-making ability would affect the perception of the IP, producing a more businesslike image.

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The process of corporate decision-making involves more than identifying the problem, collecting data and enumerating possible solutions. It involves testing these possible solutions as well: asking can it be done, how much will it cost, who will do the work, what are the risks and is the solution permanent or temporary? (See above, the *Portable MBA Desk Reference, Decision Making*.)

...It is a good habit never to raise a problem without offering a potential solution

[Even though it requires] some advance preparation for which there is often little time, raising or attempting to discuss problems without having thought through potential solutions does not impress upper management.

Fortunately, the skills used by IPs when packaging information for their corporate clients can also be used with stakeholders. Well-crafted memos can demonstrate decision-making ability and show how accepted methodology--problem definition, data gathering, analysis and possible solutions--was used in arriving at the decision.

Information professionals demonstrate strategic level thinking for the organization as a whole by anticipating trends and distributing articles on them.

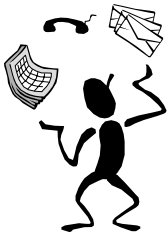
The Art of Becoming a Corporate Information Strategist

Risk-taking, Adding Value, Proactive IPs

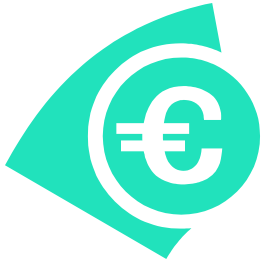
“... if you want to take your library one step further, there is risk. This risk comes in providing a service no one has asked for. ...” Cindy Hill, Manager of the Library at Sun Microsystems in Palo Alto, California.

In the Oxbrow article, the organizations interviewed stated that information professionals did not have the “ambition necessary nor the risk-taking ability required” to involve them at a strategic level in knowledge management planning teams or as chief knowledge officers.

Although no one asked them to do it, Sun’s library decided to present a reading guide called Jump Start, on hot topics they decided would be relevant to Sun. This began when Scott McNealy, chairman and CEO of Sun, did an internal radio show. “Forget Y2K,” McNealy said at the time, “the hot topic facing Sun is Euro Currency.” He felt that Sun was already well prepared for Y2K. But what was Sun--in business all over the world--doing to prepare for the January 1, implementation of the new European currency? This was a topic about which he felt North Americans were under-informed.



The Art of Becoming a Corporate Information Strategist



The library, without being asked, put together a packet on Euro Currency, and published it. “How would this be received? What if no one read it? What if they did and they thought it was not well researched or written? What if they got the wrong information? What about overstepping?” Hill said.

These were the questions on their minds that made it risky.

“Amazingly,” said Hill, “the article showed up on the front page of the company’s Web site. At Sun, this is a great honor. It is very difficult to get on the front page of the Web site, as the content there is so filtered.” Only the most useful content gets placed there. The Euro Currency team of North America loved the article.

“Thanks for pulling together such great, easy-to-put-one’s-arms-around information,” said a high level team member.

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And how does a busy library staff have the time for this task?



According to Hill, the first topic on the agenda at the library's weekly staff meetings is "what is key or current." This comes before the reactive work--the ongoing services that the team is providing. Simply by making this their first priority, the staff finds the time and energy to do this, and all of their other duties, too.

However, "there are information professionals who don't have the mindset, pro-active approach, way of operating," declares Lettis. Perhaps this mindset or lack of appetite for risk comes from the very thing that attracts people to the information profession and it is expanded by the theories taught in library school: that historically, research was to be presented but evaluations were not to be made.

The new world is different, however, and analysis is now expected of corporate librarians. They are required to "add value" according to Lettis, "to evaluate resources, filter, synthesize, to create ready-to-use, actionable information."

The Art of Becoming a Corporate Information Strategist

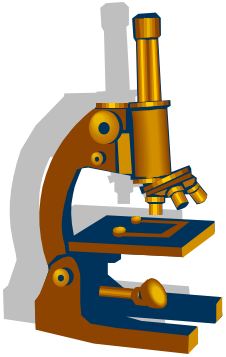
Skills for Business: Gaining Consensus, Persuasion Techniques

Information professionals must learn to gain consensus within the organization that their solution is the best one. This requires the skill of persuading others that one's decision is the right one. Lettis points out, ***“The information professional needs to understand and interpret complex relationships, but also to sell, promote and persuade....”***

One type of persuasion is simply learning to ask the right questions in the right way.

Information professionals are likely to use this skill every day. A scenario might go something like this: a manager from the marketing department is about to rely on an inferior source in making an important marketing decision. He thinks his research, which he considers “the boring part”, is finished after a quick Internet search at his desk. The manager is satisfied and enthusiastic about the decision and has involved the information professional for final justification. As a natural part of his job, the IP could ask questions of the client. A close-ended question, like, “are you sure you looked at the most reliable resources?” might generate a defensive one-word “yes” answer and eliminate any possibility of the IP offering alternative recommendations. An open-ended question is best...

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The IP has now become a trusted advisor.

“I’m curious. When you are doing research, how do you, as a researcher, know you have accessed the most authoritative sources? How do you know when your research is done?”

“Well, I don’t know, actually,” the client might reply truthfully. At this point, the client would at least question whether a quick, random Internet search is the only option. The IP could then ask about the client’s familiarity with the preferred resources, opening a discussion that engages the client, rather than threatens him with a dismissal of his research.

Using this method the IP can suggest superior sources that the conscientious client would have to consider. The researcher/client, instead of thinking he is done, is uncertain; he checks to see what he may be missing, gets a much better research result, begins to trust the IP’s suggestions, and consults this newfound resource first with his next research question.

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Presentation Skills

In fact, to get through a presentation and have a group make no comment at all is the worst thing a presenter can encounter.

Another important skill is that of giving presentations. Hill of Sun Microsystems requires her employees to give presentations and coaches them on how to handle interruptions. “In the corporate world, what really happens is that presentations are interrupted five minutes in,” she says. “Then your canned presentation is out.” In giving presentations to colleagues or superiors with precious little time, interruptions are a good thing as they show interest on the part of the listener.



The experienced presenter might keep control of the room by saying, “That’s a good question. I’m glad you asked. That will actually be covered in just a few minutes.” Experience will also tell the presenter when quickly answering the question and moving on is the more appropriate course, for instance, when the CEO is inquiring.

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When given an opportunity to make a presentation....,

requesting a formal setting, like a conference room where the presentation can be projected onto a large screen, is key. It is not advantageous for the IP to demonstrate an important innovation or new product in the casual environment of someone's cubicle or office, with people standing around a workstation .



Here's a possible scenario: the library has already created a tool that solves a problem currently being discussed by another department. Instead of approaching this as, "we have been doing this for years," the IP would, in a positive and enthusiastic manner, make a request to fully present the tool to the group. "I don't know if you are aware of this tool," the IP would say. "We have created an excellent product that is already being used in the library. We're very excited about it, and we feel that it can be integrated into your plan. I will arrange a 20 minute presentation in the board room to show you how it works."

Not only has the information professional promoted the library's expertise, he now has an occasion for demonstrating a business skill at which he excels. By approaching the opportunity in this manner, he projects a businesslike image.

The Art of Becoming a Corporate Information Strategist

Calling People You Don't Know

Today, given the need to deal with both secondary and primary sources, it is likely the technique of cold-calling will be a required skill for the information professional.

At Sun, three of the staff members of *Jump Start* have a master's degree in library science, and one has a journalism background. Incorporating the opinions of first party sources has made the articles more credible and interesting to read. In writing their articles, the first contact with the interviewees, both external and internal, was via a cold call. Initially, the librarians were unfamiliar with cold calling and needed to learn the technique. The *Jump-Start* staff member with a journalism background, instructed the others on how to deal with primary sources.

Skills involved in cold calling are used by journalists and sales people alike, and involve getting over a fear of rejection characteristic of nearly everyone. The task was made easier in that the interviewer could introduce himself or herself as a librarian. This “disarmed” the interviewee and got them talking, according to Hill, as it was perceived that the caller, as a librarian, had a “certain ethical sense”.



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Self-Promotion, Networking, and Finding Champions

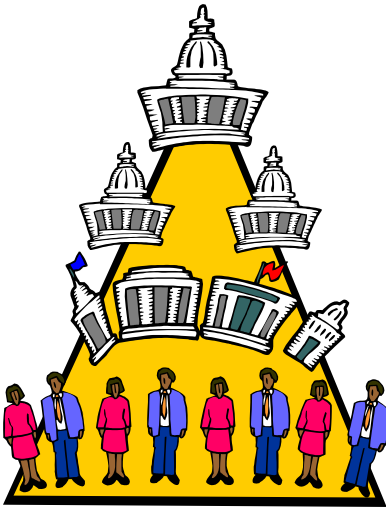
In Lettis' view, the lack of involvement in strategy happens because the IP does not even “get to the table.” [Or] as Hirsh puts it, “It is not enough to do a good job. You need to demonstrate your value to people within the larger organization. You need to promote yourself.



The work of getting to the table comes in large part through networking. Hill claims, “The library is a safe place to be, internally focused. It is also a dangerous place to be because it is internally focused. With all of the politics that go on and the re-organizations, it is highly detrimental to stay within the narrow confines of the library.”

At Sun, “we have no credibility until they have met us,” she continues. “That personal connection is imperative.” Hill admits to multiple champions and multiple friends within Sun. The company is constantly reorganizing, so “sticking with one person is not a good thing, because your champion now may have a completely different function tomorrow, in which case he or she may not be able to help you.”

The Art of Becoming a Corporate Information Strategist



The IP needs to understand the “**politics of the larger organization,**” asserts *Lettis*. “Too many people in the library profession do see the library as a haven, and are reactive instead of proactive, not getting out into the business, not partnering with people on the line, being complacent.” Lettis also believes it is very important to find a champion within the organization, preferably in departments other than the library. This could come from the operations side, marketing or finance--anywhere where there are managers who see the value of the IP and get them invited to high level meetings or introduced to decision makers and influencers within the organization.

Koenig, who in a previous position ran the Information Center at Pfizer Pharmaceuticals, **offers similar advice, cautioning that the mentor “would not be found within the information center, but be a well-respected leader within production, marketing or finance.”**

The same is true for *Hirsh*. “**Our environment changes every day. You need to develop good relationships with key people, interact with the customers and make sure that you are in their minds. This is how we are adding value.**”

The Art of Becoming a Corporate Information Strategist

Modern Management Techniques

Good managers are always looking for protégés or people who can ultimately replace them. That is the only way that an organization as a whole can do succession management.

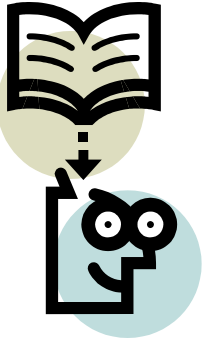


Library managers need to move away from the control mindset of “functional turfism” (*The Portable MBA, Robert F. Bruner, et.al., 3rd Edition.*) and begin grooming their replacements to assure the growth of the library staff members and the growth of the managers. Hill encourages her staff to do the same things that she does and wants them to have the same skills that she has.

Lettis applies this philosophy in her management practices as well. **“The best thing is to surround yourself with the best possible people, and to promote them.** If you are so critical to something that it will fall apart without you, you will never be tapped for the next role. If you want to be ‘plucked away’ into other areas of the organization, you have to groom people that can replace you.

Lettis feels that many of her colleagues don’t do enough to promote their replacements within their teams. “It may be because they are too insecure... but you don’t advance yourself if you act in this manner,” she adds. Instead of going to every important meeting herself, as some managers might do, **Lettis sends other people to important meetings, claiming it’s the way to “make the whole department look good.”**

The Art of Becoming a Corporate Information Strategist



Managing up has to do with putting yourself in your manager's position. Before acting, the employee asks internally what the manager would want or do. If the employee knows what the manager needs to accomplish, he can act accordingly.

At Sun, Hill has been involved in the highest levels of strategy, both in terms of knowledge management and competitive intelligence. These projects happen using cross-functional teams and Hill tries to get one of the library team members involved on each of these teams,...[that] cut across the business and are often run under true project management principles--a reason to learn the special "language" of project management, too.

. She has created learning action plans for her staff of nine and she requires hard skills, like HTML and XTML, but also insists that they learn at least one matching "soft skill", such as delivering a presentation. Hill also encourages her people to take a management class. A lot of them say that they are never going to be a manager. "But they will always have a manager and they should at least learn how to manage their manager," Hill explains, in a reference to the term "managing up."

"The ability to manage up is critical and is something that a lot of people are afraid to try," declares Lettis. "...Your job is to educate, coach, guide and disagree with your manager." But she point out, "You need to disagree in a way that is constructive, not whiney. How you say it is very important."

Enabling and empowering staff unleashes the creative talents of information professionals, helping them move to higher levels within the organization.

The Art of Becoming a Corporate Information Strategist

Conclusions on Effecting Change

Information professionals should take heart. While they are attempting to learn to be competent in business skills, others are busy trying to learn what the IPs already know.

... IPs are in an excellent position because they are in step with the new, “millennium” generation “used to information overload.”

And while there is a comfort level in continuing to do what we already know how to do and are good at, with a little courage and the checking of pre-conceived notions at the door, the joy of learning new things can begin. As the novelist George Eliot wrote, “It is never too late to be what you might have been.”



The Art of Becoming a Corporate Information Strategist

And once you've moved into a more strategic position, Donna Scheeder explains how to win in the boardroom.

4

At the 2003 SLA annual meeting in New York, the LMD Consulting section's lunch meeting and workshop was on the topic of "Winning in the Boardroom." Former SLA president Donna Scheeder gave an opening presentation on positive negotiating, with a focus on practical techniques for bringing people together to get things done. Between her presentation and the discussion groups which followed, many ideas were generated!

Winning in the Boardroom

Do your meeting homework



Before holding or participating in a meeting where you are seeking a favorable decision to a proposal, don't leave the negotiation and discussion to the meeting - work it out beforehand.

Meet with each participant individually before the meeting to brief them and ask personally for their support.

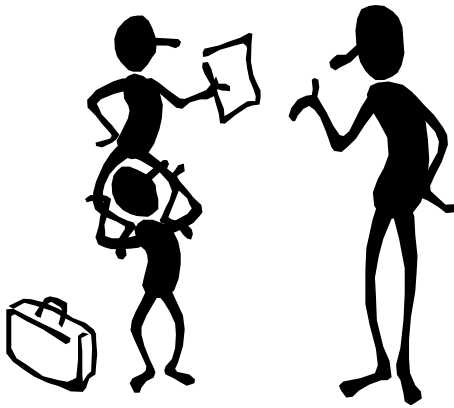
- If someone is practicing negative politics, find out what they need and think of ways to help them achieve it as part of your proposal.
- Build alliances or partnerships to increase the number of stakeholders.
- Send out a meeting agenda beforehand and follow it with notes of any action items or decisions from the meeting.

Winning in the Boardroom

Build a favor bank

If you build trust and reliance by going out of your way to help others over time, you will have an invaluable resource when you need support in making a case to management or partnering to get something done across the organization. Examples:

- Help someone new to the organization navigate his way through internal procedures or get connected to the right people.
- Establish a non-work connection with people from outside your own department.
- Remember that time is everyone's most valuable resource.



Winning in the Boardroom

Know your organization



- Have a mental map of **who the influencers are for every decision** - very often they are not only the obvious organizational managers, but the "experts" whose opinion is sought on key issues because of their depth of knowledge or experience in the organization.
- Identify two or three people whose opinions are highly respected by your manager and consult with them as part of formulating a plan or proposal.
- Within your client community, identify a couple of people who are trusted and credible to others in their departments and work to strengthen your relationship with them.

Other points stressed were the value of understanding and using the processes within your organization, getting feedback, building alliances, stepping up to fill voids left by others, and giving more credit to your allies and supporters than to yourself.

All of these ideas are useful as guidance for taking a positive approach to organizational politics.

For an example of a power map see: <http://www.itstime.com/oct97map.htm>

Winning in the Boardroom

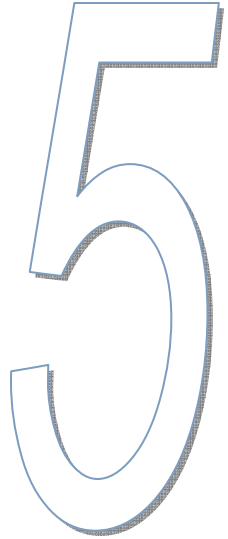
Making a Paradigm Shift

When speaking of transformation, a good way of expressing the idea is to think of it as a “paradigm shift”. A paradigm is a set of rules or a level of awareness of how things are. It governs thinking and perceptions and expectations of how things should be or how you should perform. The current paradigm for librarians and information professionals is not completely positive because there are too many historical stereotypes that governing how people perceive the information center. However, for information professionals today, there is a paradigm shift in the making.

And the shift is not just an adjustment from one way of thinking to another. It's a revolution--a complete transformation or metamorphosis. To take advantage of this change, information professionals must fundamentally modify their own approach to users and the way they deliver services. They need to cultivate the altering of others' assumptions.

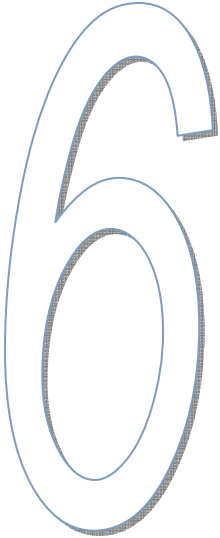
Taking advantage of the paradigm shift means transforming the long-held traditional roles where they are available to everyone's requests and mostly react to their environment into one that empowers others, builds key relationships, and is proactive, both in anticipating needs and providing the most appropriate solutions.

This is the type of information professional who is seen as a strategic thinker and can be assured of an invitation to the next meeting on information planning.



Conclusion

Selected Resources



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