
Breaking With Tradition: Can Librarians Learn Important Lessons From Marketing Managers?

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Recently, in a bold move to enhance service, the director of our library at IPFW (Indiana University-Purdue University at Fort Wayne) terminated our bibliographic instruction program and radically altered the way in which reference service is provided. The changes, implemented with the full support of the reference team, were developed in response to financial and personnel deficiencies. The apparent success of the new service suggests that the time is ripe for librarians to implement the types of changes which have been explored in our professional literature for the past decade. In implementing these changes, our library has just begun to take some tentative, shaky steps toward approaching service issues from the standpoint of marketing professionals.

During the spring semester of 1993, Library Director Larry Griffin communicated the following concerns to campus faculty:

1. Over the years, librarians had taken on more assignments while financial support for the library had been lean.
2. Librarians, in taking on additional duties, were not able to provide top quality service in all areas. There simply weren't enough hours in each day.
3. It was imperative that the library prioritize services in order to evaluate how to respond to the current financial climate. Services had to be trimmed. Maintaining all services merely guaranteed mediocrity.
4. It was also imperative that the library explore innovative methods of making the very best use of the resources available in order to survive in a financially hostile and radically changing informational environment.

In spite of the library director's concerns, the faculty senate voted to make other campus issues top priority and stipulated that the library should receive no new money for the next biennium. While recognizing that innovation

usually requires funding, our director was committed to change.

In 1985, five full-time reference librarians provided information services with back-up support provided by three librarians from other departments. In addition, there was part-time professional support at the reference desk 20 hours per week. But because of personnel reorganizations over the years, by 1993 there were only four librarians on the reference team at IPFW. Combined with restraints placed on librarians to perform in areas of service and professional development necessary for obtaining promotion and tenure, this meant that it was becoming increasingly improbable that the reference desk would be staffed continuously by librarians.

It was also of great concern to the director as well as the reference team, that librarians were helping students with types of tasks that paraprofessionals could perform while students with in-depth, research-oriented questions were queuing up at the reference desk. The library's BI (bibliographic instruction) program was eating up many hours of the reference team's time, yet served only a small population of the campus community. It was doubtful to the director that quality BI and quality reference service could both be maintained. Reference was deemed top priority, so in the fall of 1993, BI was terminated. Since all reference librarians agreed that answering basic level questions at the reference desk was not the best use of their expertise, the traditional reference model was examined. With such a small professional staff, there was extra pressure to funnel energies wisely.

The director invited librarians' ideas on how the traditional reference model could be altered to provide quality service with no new money, no new equipment, and no influx of greatly needed additional staff. After much discussion, the decision was made to implement a two-tiered reference model. Information paraprofessionals, who were trained by librarians, would provide triage service at an information desk while the library was open. Librarians would conduct one-on-one reference service in an office on an appointment basis. Each librarians' daily office hours would be available to paraprofessionals for either directing patrons to librarians on a walk-in basis or for making future appointments. A total of 55 hours of professional service would be available for appointments per week.

We knew that there would be times throughout the day when professional level reference service would not be available, either because all office hour appointments would be full or during times when no librarian had hours. But the director and reference team thought that this system would provide a way

of guaranteeing patrons professional level reference service with severely limited reference staff. Even though the new model would force some patrons to wait for professional level service, it was hoped that this method would be superior to simply cutting back drastically on reference desk hours where no staff at all would be available. Librarians were also prepared to make additional appointments outside of their office schedules.

Paraprofessionals at the information desk would aid patrons in what was termed level-one questions, such as how to print and download, library hours, how to read call numbers, and to answer general questions from almanacs and encyclopedias. A task force was set up to create new reference policies and procedures, to decide how the paraprofessionals were to be trained, to restructure the physical environment at the reference desk to address issues such as traffic patterns, and to monitor the model with a mind to improving the system.

In the late summer of 1993 the new reference model was operational. The concept of distinguishing between differing levels of reference service is not new. Miller and Rettig were challenging the traditional reference desk model in 1985:

“...most academic libraries’ reference departments squander their professional personnel on answering simple directional questions...Reference departments’ staffing patterns have reflected the belief that professional librarians must make their services available on demand...Released from answering directional and simple questions and freed from the limitations of being available on demand, librarians could devote their time and efforts to information services designed to save the time of the reader...”¹

We had followed a managerial process defined in the business world as strategic planning. A service organization following such a plan defines its mission, sets goals to achieve the mission, develops strategies to accomplish those goals, and sets up a structure to evaluate both current and future activities. Our mission was to make a total commitment to producing consistently top quality reference service. Any opposing mission, such as hanging on for dear life just to keep things running as usual, was rejected. One pivotal goal we made to support this mission was to find a way of enhancing point-of-use service at the reference desk, while fully exploiting the professional expertise of our librarians. We analyzed both our strengths and weaknesses and were willing

to sacrifice certain activities such as bibliographic instruction which fragmented and diluted our efforts. A basic precept of total quality management allows those involved in the system to analyze it and to constantly elicit feedback as the environment changes. This was what the task force was created to do.

A marketing manager identifies the products or services that an organization provides in order to evaluate which products/services offer the most potential growth for that organization. To do this, the organization's customers must be identified. Our clientele at IPFW is mixed. We serve students, faculty, and the general public. Although we are happy to assist anyone, our collection development, interlibrary loan, and reference activities are aimed at the academic community rather than the high school or elementary school students. Our target market can be identified as college students and faculty. If we wish, we can further segment this market into graduate and undergraduate students, college level students at risk, part-time faculty, or full-time faculty. We can also further segment our target market by discipline, such as chemistry, physics, fine arts, or psychology.

After identifying the target market as IPFW students and faculty, the next step a marketing manager would take is to position the organization among competitors. For instance, how does the chemistry faculty provide for its own information needs? Besides the library, what information providers do graduate business students turn to? We did not conduct formal market research to answer such questions. We merely posed these types of questions as a way of encouraging ourselves to take a marketing approach. The basic question we asked ourselves while suggesting new ways of offering our services to our clients was: What would be the best method of getting the product (reference service) to the customer? The appointment system was seen as a way of achieving this aim.

When we planned the new reference model, we had some concerns. How could we be assured that paraprofessionals would not answer in-depth, level-two questions? Would our clients respond favorably to a system which required them to make appointments for the type of service that had previously been provided on demand? Would the reference librarians become out-of-touch with the reference collection by being stationed in an office?

To our delight and relief, there were many positive outcomes. As it turns out, it is possible and realistic to train paraprofessionals to distinguish between basic level-one questions and the more in-depth level-two type questions. Does this mean that a paraprofessional has never good-naturedly tried to answer a

professional level question? Of course not! A system which encompasses the human factor always falls short of perfection. The only way to assure against this type of mistake is to have a professional out at the desk at all times policing the area; something that would be impossible with our limited professional staff. A relationship of trust has to develop if this type of system is to work. The task force, originally created to implement the new model, also organizes meetings to evaluate it. During these meetings, both paraprofessionals and librarians communicate their experiences and concerns. Throughout each day, both groups also communicate informally. One important lesson we learned thus far is that the more camaraderie and respect which exists between members of the reference staff, the more smoothly and efficiently we can deliver our services to the client.

Client resistance to the new model is not as significant as first expected. Experience has shown that patrons walking into the office are grateful for the librarian's undivided attention. No one we counseled has shown impatience or resentment for having to wait to see us. If there are clients who are deeply dissatisfied with the new service, they have not made their complaints known to the library. But what about the person who declines to make an appointment and leaves the library unsatisfied? We do not have any mechanism in place for tabulating the number of people who leave the library because they do not wish to make an appointment. However, we never had any organized way of tabulating how many dissatisfied customers we had in the past, either. How many people were being frustrated by the annoyingly long lines at the traditional reference desk? How many patrons would leave without having their needs met because of the old staffing patterns? If the new model is imperfect, then we must recognize that the traditional model had its drawbacks as well.

Simply recognizing that we had dissatisfied customers in the past doesn't do much to improve the model as it stands today. We must look towards more organized ways of evaluating problems such as customer resistance and dissatisfaction. We as librarians have always fretted about the quality of service we provide. The traditional methods we used to enhance reference service were to create pithy signs, distribute what we hoped were interesting library guides, and introduce BI programs. To be more in tune with the concept of customer relations, librarians should consider more systematic methods of conducting marketing intelligence. Service industries deal with issues of customer satisfaction by creating systems for monitoring service. There are many marketing techniques, such as hiring focus groups, to accomplish this task. Presently, we at IPFW perceive that the new model is satisfying more clients than not. To ensure that our perceptions are not faulty, we are taking steps towards perform-

ing formal market research. For instance, we have begun to develop a suggestion/complaint form for our clients to communicate with us.

Even though the reference consulting office was equipped with a computer, modem, and CD-ROM drive, all librarians feared becoming out-of-touch with reference services. This concern turned out to be the least of our worries. Whenever there is a need to crack open a book, the librarian simply leaves the office with the patron and heads for the stacks. With appointments scheduled in half-hour increments, there is enough time for the librarian to return to his/her office for the next appointment. Should another patron interrupt the consultation while the librarian is out on the floor, it is explained that the librarian is involved with an appointment and that the first patron deserves his/her undivided attention. The second patron is then directed to the information desk in a friendly manner. It could be argued that this technique can have a negative impact on the profession by perpetuating an image of the librarian as someone who is unattainable or hard to find. But it can equally be argued that this strategy enhances our image by forcing patrons to realize that we can only assist one patron at a time, and that while we are doing so, that person receives the very best service. In any event, there is no danger of the librarians becoming out-of-touch. We are in the reference stacks as much as we ever were.

It is obvious that by terminating BI and restructuring reference services, our director was more willing to face controversy than the death-by-neglect state of traditional service on our campus. He is not alone. Tom Eadie, in an attempt to defy the status quo, defines BI as redundant in his infamous article "Immodest Proposals". Eadie's stance is that BI does not enhance reference, but duplicates it, and does so badly.² Debate over Eadie's views is heated. His assertions are probably the most threatening to academic librarians whose duties center completely on BI.

ACRL's Community & Junior College Bibliographic Instruction Committee questioned Eadie's article in a recent issue of *Research Strategies*. In defense of BI, the Committee cited major premises challenged by Eadie and then countered with its own rebuttal. One point Eadie made in his original article was that BI was created by librarians and was not a service clients asked for. The Committee responded:

"As professionals ... we should be proactive...It is acceptable, and even expected, that we create services because we believe users will benefit from them, even if users have not articulated or even recognized their need for these services."³

Without contradicting the notion that we are professionals, is the Committee's response in regards to this matter counter-productive? Will not putting enough emphasis on client input result in a noncompetitive service that will adversely affect our market share? In other words, will we be loosing our patrons to the ever increasing information alternatives open to them? Can librarians compete in the new Information Age with this type of insular attitude? If we are comfortable with the notion that as professionals we are experts at knowing what is best for the client without client input, will we be making the types of changes necessary to survive in future? Or will there develop a gulf between management perceptions and customer expectations?

Perhaps the significance of Tom Eadie's article does not rest wholly in whether he is right or wrong. What is significant is that he and others like him are questioning the status quo. Librarians should be continuously re-evaluating traditional service models with an eye to providing finer service. We should be applying the concepts of total quality management to what we do. However, if we perform our own brand of market research with preconceived ideas of what we'll find (such as BI is good or BI is bad) then our results will be prejudiced and hence invalidated.

My own informal market research has suggested that there is indeed something amiss with generalized BI services aimed at the novice. Students themselves have stated that they feel overwhelmed by the 45-minute, one-size-fits-all tutorial. If BI were ever to be re-instituted at IPFW, it is my hunch that only in-depth, course-integrated programs, resulting from intense library/faculty collaborations would be truly effective. Many faculty at the university agree with this notion of product enhancement. But the administration would have to show financial support for such a scheme, due to the people-power drain on reference this plan would cause. We would also be wise to solicit feedback from the students on how effective these intense BI sessions were.

What is it about marketing which makes librarians so suspicious? We have been exploring marketing themes in our professional literature and at our conferences for at least 10 years, yet real change is slow to occur. Some of us have identified our lack of business savvy and resistance to change. Elizabeth Wood provides an amusing description of the modern librarian:

"One of the greater ironies of the library profession is that many of us conjuring up an image of crass commercialism, reject the marketing concept... Who wants to feel like an encyclopedia salesman, aggressively pushing a product that people

really don't want? Yet our prescriptive approach to promoting the library, leaning heavily on public relations and selling techniques to entice a wary public into accepting what we [author's emphasis] have decided is good for them... is uncomfortably close to the mentality of the poor fellow out there hawking encyclopedias. Can we afford to keep rejecting marketing? Probably not."⁴

Are librarians uncomfortable with any methodology associated with commercialism? The marketing profession is aware of this type of resistance. In *Marketing Management*, Philip Kotler offers his explanation:

"There are several reasons why service firms neglected marketing in the past... There are service businesses (law and accounting firms) that formerly believed it was unprofessional to use marketing. Other service businesses (colleges, hospitals) faced so much demand until recently that they saw no need for marketing"⁵

Kotler writes of prejudice against marketing in the legal and accounting professions. Does the library profession also reject marketing because it does not seem to convey an image of professionalism? Stanley Shapiro, as professor of Marketing at McGill University, in an article addressed to librarians stated that professionals "...trained and employed in the so-called helping and learned professions harbor a deep-seated hostility toward marketing as a commercial activity."⁶ He further advises that librarians adopt marketing attitudes as a means of satisfying their clientele. Kotler's point about colleges and hospitals not being attuned to the possibility of losing their customers, also relates strongly to libraries. Any sound marketing strategy accepts the notion of competition. Not coming to terms with our own distaste for what seems to us as inappropriate good business sense prevents us from examining how we fit into the information market. The financial crisis which compelled our library to experiment with a new service model is but one of the many stresses threatening librarians. One stress librarians seem to consistently ignore while making management decisions is competition. Compare the modern library to one organization that does not have competition -- the Department of Motor Vehicles (DMV). People complain about the long lines and surly clerks at the DMV. Whether such is true of this organization or not, a valid question to ask is, "Is the DMV pressured to change?" The answer is "no." One can complain about poor service at the DMV, but one cannot demonstrate this dissatisfaction by going to a competitor. How long can librarians assume that the library is the

only information option open to our clients? Service industries outside the academic world have already come to terms with the very powerful force of competition. It is our time to do the same.

The biggest mistake we can make now at IPFW is to assume that we have discovered the ultimate solution to our financial and staffing woes. This attitude would certainly deter us from making further improvements. What we have done is found a solution, not the solution. We have begun to approach our jobs in new ways. There is still much to do. We have learned that it can be productive to question and challenge traditional approaches to reference service. Librarians have been toying with the concepts of production management and marketing strategy for years. Are librarians ready to forge ahead with lessons learned from the world of business? Perhaps the better question to ask is, "Will we as information experts be flexible enough to survive in the future information marketplace?"

Sources

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