Welcome to the June 2015 issue of *AIIP Connections*. In this issue, we report exclusively on AIIP’s annual conference held April 16 through April 19 in Irvine, California, USA.

The Member Spotlight is on Roberto Torres, of Torres Research Services and winner of the 2015 Myra T. Grenier award.

After that, the issue is filled with conference reporting. And I must give a shout-out to our dedicated member reporters who volunteered their time and talent to bring these reports to you. Without them, we would not have a conference issue. Thank you.

Elizabeth Trudell, formerly of ProQuest Dialog and now at Columbia University, gave the Roger Summit Award Lecture on Knowledge-enabled Products. Elizabeth then joined Roger Summit, founder of Dialog and long-time AIIP champion, for an on-stage dialogue, if you will, moderated by AIIP conference chair, Ed Vawter.

Keynote Speaker Peter Derycz, of Reprints Desk, spoke—quite entertainingly—about *Productizing your Services*. Featured Speaker Samantha Bennett, of The Organized Artist Company, told us how to *Get It Done: From Procrastination to Creative Genius*.

Our own AIIP members rounded out the rest of the informative conference agenda.

Ellen Naylor and Linda Stacy expounded on *How to Optimize Your Productivity and Expand Your Energy to Lead Your Business to New Heights*.

Mary Ellen Bates and Deb Hunt described their experiences with self-publishing in *Author! Author! How to Get Fame, Fortune, and Clients through Self-Publishing*.

Jennifer Burke talked about marketing strategies in her presentation, *Your Well-Oiled Referral Machine*.

We learned about subcontracting strategies from Marcy Phelps, Carey Lening, and Jocelyn Sheppard in their presentation *Subcontracting Success: How to Grow Your Business Through Collaboration*.

The issue wraps up with reports on a variety of topics gleaned from the annual Tips on the Terrace sessions—once again truly on the terrace for this conference. Why waste all that gorgeous California sunshine?

This year’s conference charity give-back benefited Laura’s House, and AIIPers gave graciously to support it.

Enjoy the June 2015 issue of *AIIP Connections*. AIIPer Mark Goldstein and his trusty camera have again provided all conference photos in this issue. A very grateful thank you goes out to him for providing them.

Joann M. Wlekliniski  
*Editor, AIIP Connections*
The annual conference is over and here I am, installed as AIIP’s president.

Immediately following the annual AIIP Conference, I typically spend time getting my house in order, so to speak. I empty out my conference bag and sort through the various business cards, books, fliers, and swag that I gathered at the conference. I send out follow-up notes and LinkedIn requests. I review and type up my notes from workshops and sessions. I then embark on refining my business planning for the year. While I certainly start off the calendar year with goal-setting, it isn’t until I experience the AIIP conference that I get a sharper sense of how to accomplish those goals for my independent information business.

This year the getting-my-house-in-order process post-conference took on greater meaning and scope as I stepped into my new role as AIIP President and simultaneously moved into a new old house. As I write this, I am starting up a client project with an AIIP colleague, having calls with my fellow AIIP board members to build off of a great kick-off meeting in Irvine, scheduling networking and speaking events, trying to find surge protectors, toothbrushes, and the dog food in all the boxes that surround me, selecting paint colors for the contractors, discovering how to balance the furniture on these lovely old and uneven wood floors, and, yes, going through my AIIP conference bag, which was the last item to get packed and the first to be found in the house move. My usual state of feeling reinvigorated, renewed, and re-focused post-conference is certainly being tested during this very active stage of my life.

As I try to balance it all and prioritize, I reflect on why I continue to be a member of AIIP, attend the conference, and volunteer in some capacity year after year. It’s rather simple: being an AIIP member helps me keep my business in order and that in turn helps me keep my life in order. By taking advantage of all that AIIP has to offer and actively engaging in the association, I gain relevant business-building and life experience, meet and learn from interesting and talented colleagues, and gain access to important resources, all within an environment of camaraderie, collegiality, and intimacy.

I am grateful for our band of AIIP volunteers who continually look to deliver new learning experiences and valuable benefits for our members throughout the year and at conference. I’d like to give my particular thanks to Conference Planning Chair Ed Vawter and his team for putting together a fantastic event, as well as the many other volunteers who contributed their time and effort to creating such a valuable experience. Planning is currently underway with our new Chair, Peggy Garvin, for the 30th AIIP Annual Conference, which will be held in Pittsburgh, Pennsylvania, USA, April 6 to April 9, 2016.

I would like to also thank our volunteer Board members. It’s been a privilege this past year working with Jocelyn Sheppard (outgoing Immediate Past President), Joann Weklinski (outgoing Secretary), and Charlene Burke (outgoing Director-at-large). I’m already enjoying working with our new Board: President Elect, Jane Langeman; Immediate Past President, Connie Clem; Secretary, Shelly Azar; Treasurer, Marilyn Harmacek; Director-at-large Marketing, Jennifer Burke; Director-at-large Membership, Michelle Rawl; and, Director-at-large Operations, Ken Watson.

Lastly, I am honored to serve as AIIP President this term and be a part of your leadership team. I enjoyed meeting and getting to know many of you at the conference, and look forward to doing the same with many others throughout the year. Don’t hesitate to reach out to me at june.boyle@cerco-research.com.

Cheers,

June Boyle
Need Primary Research?

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Welcome AIIP’s Newest Members:

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- Nancy Burvant, Louisiana State University
- Denise Carter, DCision Consult Sarl
- Paul Coulis, The Paladin Consultancy, LLC
- Karline de Boer, Research Services Ltd
- Barbara Fullerton
- Zeev Greenberg
- Carol Honore, Research Information Solutions
- Erin Iannacchione
- Juan Juarez
- Sara Koch, SRK Information Services LLC
- Andi Kola, K Information Services
- Gail Larsson, GreyWolf Services Pty Limited
- Stephen Lippman
- Vashti Ma’at
- Travis Mann
- Edward Olefirowicz, Edward M Olefirowicz & Company, LLC
- Andrea Ryce
- Amy Senn
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- Timothy A. Storlie, Ph.D., Personal Medical Research Services
- Robin Taylor
- Roberto Torres, Torres Research Services

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I am not a librarian; I am a researcher, which is what I thought after my first glance at the AIIP website. For the past 16 years I have dedicated my professional career to the development and management of clinical trials. I decided to—or should I say, a book helped me—plan my future. My name is Roberto Torres and my company is Torres Research Services.

My last venture before I decided to become an independent researcher was developing and coordinating Phase I oncology trials. The job was rewarding, but at the same time extremely stressful. After establishing relationships with oncology patients and families, we hoped for the new treatments to work, however, in many circumstances the hard news needed to be delivered. Two of my closest patients died before my Christmas vacation.

My family tradition during vacation is to acquire a book to read during the week. I searched on my Kindle for a book related to research. Mary Ellen Bates’ book Building & Running a Successful Research Business appeared on the search results. So, I purchased the book and read it during my vacation.

After I came back from my vacation, the idea of becoming an independent researcher was strong. I visited the AIIP website and listened to webinars on the subject before I made my decision. I felt that I was swimming in strange waters; yet, it felt right. I told my wife about my decision of leaving my job and becoming an independent research professional. With this decision also came a relief and a new positivity on how I viewed my professional career.

The gathering in Irvine, California was my first AIIP conference and I was honored to be the Myra T. Greiner award recipient. I would like to thank Michelle Rawl for encouraging me to apply for the award. Michelle was the first AIIP member to contact me after I signed as a volunteer. Her conversations made me realize that I made the right decision in joining AIIP.

After my first AIIP conference, I returned home with a new perspective, dozen of applicable ideas, new products and resources, and a community of colleagues and advisors. This was the best conference I have attended. I had an amazing time building connections with professionals from around the world.

During the conference I recognized that AIIP is a collection of colleagues who are present to help you succeed and provide you with pieces of advice.

The warm welcoming during the preconference dinner made me feel as if I had known my new colleagues for years. After the first day, I felt integrated and accepted, strengthening my thoughts that I can succeed as an independent researcher. During the conference I recognized that AIIP is a collection of colleagues who are present to help you succeed and provide you with pieces of advice. It was amazing to hear how each member was using information in a particular, creative way. We had private investigators, copywriters, taxonomist, librarians, film editors, lawyers, and many other disciplines present at the conference.

My big takeaways were discourse on obtaining the value of our talents and applying them towards our industry expertise. Each section provided meaning and substance to integrate in our businesses. AIIP members shared their best tools and resources: Ulla de Stricker and Cindy Shamel with their pre-conference session “Landing a project…and then nailing it;” and the First-timers Orientation session with Mary Ellen Bates and Cindy Shamel. Every conference session was meaningful.

For me personally, one of the conference highlights was meeting Mary Ellen Bates, the author of the book that changed my career life. Meeting Roger Summit, the founder of Dialog, how cool was that! I used Dialog (now ProQuest) for many years during my education. Keynote speaker Peter Derycz from Reprints Desk was equally inspirational.

These are the impressions of a researcher who, for years, attended medical investigators conferences. The 2015 AIIP annual conference in Irvine, California, USA came with plenty of role models. Incredible tips and resources fostered during the entire conference plus camaraderie of new partnerships for me are the keys to a stronger career.

Dr. Roberto Torres is the President and CEO of Torres Research Services, a Business Intelligence and Clinical Trial Management organization for pharmaceuticals and biotechnology industries. You can reach him at 214-564-4869 or at robertotorres@torresresearchservices.com, or view his website at TorresResearchServices.com or his LinkedIn profile at www.linkedin.com/in/torresresearchservices.
Congratulations to AIIP’s 2015 Award Winners!

**Marilyn Levine President’s Award — Marydee Ojala**
The AIIP President’s Award is given in recognition of any person or institution which has demonstrated extraordinary support of the Objectives of the Association.

**Sue Rugge Memorial Award — Marge King**
The award consists of a $500 cash stipend awarded to a Full member of AIIP who has significantly helped another member through formal or informal mentoring.

**Myra T. Grenier Award — Roberto Torres**
This award offers a $600 stipend to enable a new or aspiring independent information professional to attend the AIIP Annual Conference.

**AIIP Connections Writer’s Award — Jan Knight**
A $350 travel award for the Annual Conference is given each year to the writer of the best original article published in *AIIP Connections*. “Strategic Alliances to Help Build Your Business,” Dec 2014 issue of AIIP Connections.

**Roger Summit Conference Sponsorship — Not awarded in 2015.**
This award provides $1,000 and free conference registration to an AIIP member attending his or her first AIIP annual conference.

More information, including lists of past award winners, can be found at [http://aiip.org/about/awards](http://aiip.org/about/awards)
The 2015 AIIP charity to benefit the conference host city was Laura’s House. AIIP members generously supported the Laura’s House mission, which is “to change social beliefs, attitudes and the behaviors that perpetuate domestic violence while creating a safe space in which to empower individuals and families affected by abuse.”

At the conference opening reception, Laura’s House board member Kerri Strunk thanked AIIP members for their contributions. She spoke about the exceptional work being done to provide services to mothers and their children throughout the Irvine area.

This year’s give-back initiative raised $1,926 through an online donation campaign. AIIP Past President Jocelyn Sheppard’s challenge of $500 in matching funds kicked off the online contributions. The night of the opening reception, AIIP Past President Cynthia Hetherington matched the general membership donation with a generous gift of $600.

Patti Peregrine is the owner of Digi Organizer, which mindfully organizes your company’s digital chaos. Contact her at psp@digioorganizer.com and visit her website at www.digiorganizer.com.
Two DIALOGs at Conference 2015:
The Roger Summit and Elizabeth Trudell Experience

Reported by Ulla de Stricker, de Stricker Associates

Dialog One:
The Roger Summit Award Lecture

Every year at the AIIP annual conference, thanks to the inspiration of AIIP past presidents, conference attendees enjoy an expert presentation by an industry leader with highly valuable messages. The lecture is named in honor of Roger Summit, the founder of Dialog and a beacon in our industry. At this year’s Roger Summit Award Lecture—thanks to inspired brilliance on the part of the conference program team—we were treated to an outstanding presentation by Elizabeth (Libby) Trudell, one of Roger Summit’s key senior people at Dialog during several decades. (Elizabeth’s presentation slides for Knowledge-Enabled Products: A World Transformed by Metadata are posted at www.aiip.org/conference/presentations/elizabeth-trudell.) Elizabeth is a familiar figure to those who have used Dialog through the years; for those unacquainted with her, she is—much like Roger, himself—personable and warm beyond compare.

Elizabeth explained in several engaging ways how metadata drives the experience we have when we interact with systems, apps, and websites. Using findability and results presentation (facets) as the structural themes, she illustrated just what it means for users when the metadata is well designed, granular, and ample. Who knew that Netflix has 76,897 unique ways to describe content so that users may identify or be presented with new material they might like?

Moving from the close-to-home example of shopping for an elbow-length sleeved T-shirt (“tee” is the correct word, it turns out, but what online clothes vendors go to the granularity of describing the length of sleeves?) to the more esoteric matter of spimes (see en.wikipedia.org/wiki/Spime), Elizabeth pointed out how user ratings and contributions to metadata and user consumption behavior add up to a potentially risky trail and drew attention to examples of “privacy shield” tools.

For an audience of information professionals, the presentation was candy that we gobbled up eagerly. Metadata is where we live. Every website, every app, every system with which we interact needs metadata, and we are here to apply our skills in determining what kind of tagging might be advantageous. Elizabeth opened the door to a wider spectrum of arenas in which we have value to offer.

I came away thinking “by the labels attached shall it be known and findable.” Brilliant, sharp, insightful, thought-provoking, knowledgeable, creative, and stunning … these words do not begin to describe the presentation!
Two DIALOGs at Conference 2015:
The Roger Summit and Elizabeth Trudell Experience
Reported by Ulla de Stricker, de Stricker Associates

Roger Summit and Elizabeth Trudell Reminisce and Share their Dialog Experience

In a further stroke of inspiration on the part of the program team, Roger Summit and Elizabeth Trudell were asked to “dialog” on the stage. Ed Vawter made no bones about the fact that he had insisted on moderating the session.

Issuing a number of deft questions, Ed had Roger and Elizabeth describe the revolutionary early days of Dialog, when computers were transitioning from batch tape to the IBM 360 series, and then the subsequent corporate meanderings. Candid and honest, they shared stories of triumph and challenge as the ownership changed over the years. Indirectly, they shed a lot of light on the power and impact of organizational culture and on the results of owners’ engagement with customers via the in-person training (no longer done) or via customer advisory boards.

One of Roger’s key points was the successful vision he had to bring onto one platform all the databases he could identify. In retrospect, he said, he might have moved to an ad funded consumer orientation; as it was, the Knowledge Index consumer product never took off. Roger stressed how the library school program offering access to selected files for students was a key strategic move to familiarize librarians with Dialog early in their careers.

The focus on customers through several corporate owners was Elizabeth’s concern. She stressed how staying in touch with users was essential in product development under the shifting corporate tides.

Roger and Elizabeth concurred in saying that convenience is king: “Make it easy for the customer to use your service, and be there for the customer!”

In response to Ed’s questions, Roger and Elizabeth shared a few tips for retirement (not that we need them quite yet—hm, hm—but they are worthwhile to share with an audience of driven information professionals): Build interests and engagements according to your preference and ignore the call to volunteer for things you are not keen on (aka “learn to say no”). Offer your skills where you make a difference. Stay in touch—having a huge network is priceless and will become even more important as time goes on.

Thank You to the Conference Organizers

The consecutive sessions served to affirm longtime AIIP members’ career choices and to encourage newer attendees that there is work to be had in vendor organizations. I thank the 2015 organizers for bringing Roger Summit and Elizabeth Trudell to Irvine to provide a truly uplifting experience. In them, we have icons to emulate.

Ulla de Stricker’s consulting practice focuses on strategic planning for information and knowledge management and for access to corporate memory and expertise. She is the author of several professional books (see www.destricker.com) and is well known for her generous support and guidance to colleagues.
Optimize Your Productivity and Expand Your Energy

Presented by Ellen Naylor, Naylor Wellness, LLC, and Linda Stacy, LivingBluPrints

Reported by Beth Plutchak, Beth Plutchak Consulting, LLC

Ellen Naylor and Linda Stacy presented this session. They broke it into two mini-sessions with Stacy presenting on productivity and Naylor presenting on energy.

Linda Stacy is the founder of the LivingBluPrints (livingbluprints.com/) project. She specializes in productivity training and consulting. She began by putting up a slide with the expression “Fake It Until You Make It”.

Stacy then told this story as an example of success through stretching our capabilities: A lawyer in Connecticut started selling on eBay. This led him to writing an article on “eBay selling” for Entrepreneur Magazine. Then eBay asked him to be a speaker on a panel which led to earning $10,000 per month from speaking gigs and being considered an expert on eBay selling. His success came about because he was willing to stretch himself to try something new at every step.

If you were the best in your field what would your day-to-day look like? Success is the sum of small efforts repeated day in and day out.

To become more productive we need to understand the limits of time, energy, and money. We can apply budgeting principles to all three of these concepts. Look at income, expenses, and results to analyze energy and time as well as money. This is the first step to prioritization. “Brain Dump” is one tool to get this information out of your head and onto paper. Then you can review your “budget” and log items going forward. Another tool is calendarizing (from David Allen’s Getting Things Done). On Stacy’s website she also has tools and tricks for identifying those items that cause problems, for increasing joy, and reducing energy drain.

Ellen Naylor is a veteran in competitive intelligence. In 2014 she added Coach Stressbuster to her repertoire and formed Naylor Wellness, LLC (naylorwellness.com/home/). She provides wellness coaching for corporations as well as individuals. She helps clients spend more time in “I can do” and “I want to do” and less time in “I can’t do” or “I should do, ought to do” modes.

During her half of the presentation, she covered an area which is often referred to as self-care or increasing productivity and expanding energy through putting taking care of ourselves first. Recently she had some changes in her life that resulted in some first-time health problems and she had to rethink how she handled stress.

When a person becomes disengaged, 80% of that is caused by stress. Stress can be mitigated first by getting enough sleep. The importance of sleep as a stress buster cannot be underestimated. Adequate sleep improves metabolism and the ability to manage weight.

Ways to get better sleep include turning off the tech, using aromatherapy, and deep breathing exercises.

Another stress reducer is connecting with family and friends. Spend time with the people who make you happy. Reduce your expectations and let go of perfectionism to get the most of your relationships.

The physical also reduces stress. Beyond getting enough exercise, use exercises that stimulate your skin. Hugging has twelve recognized benefits including correcting your oxytocin and serotonin levels.

Improving nutrition helps reduce stress, but so does the way that you eat. Eating slowly and mindfully helps control diet and improve nutrition.

Look in the mirror every morning and say “I love you”. After resisting meditation for years, she has found that ten to fifteen minutes a day has a huge positive benefit.

Ellen’s presentation was packed with tips on managing health and reducing stress. She has additional resources on the Naylor Wellness website.

Beth Plutchak is an extroverted data geek who has been turning noise into actionable information for over twenty years. She specializes in market research for businesses and communities, industry research, and regional economic analysis. She works across industry segments with specialties in finance, agri-business, and retail.
In this session Mary Ellen Bates and Deb Hunt shared the pros and cons of self-publishing as well as the Five Ws (who, what, when, where, and why) to consider before self-publishing. Mary Ellen wrote The Reluctant Entrepreneur: Making a Living Doing What You Love (2014, Niwot Press), and Deb coauthored The Librarian’s Skillbook: 51 Essential Career Skills for Information Professionals with David Grossman (2013, Information Edge). Cindy Shamel of Shamel Information Services introduced the speakers and facilitated the Q&A.

To gain clarity of purpose and to understand the demands that self-publishing presents, Mary Ellen and Deb recommend evaluating the opportunity to self-publish by answering five simple questions—the Five Ws. In so doing, a prospective self-publisher can then better proceed with resolve or abandon the project with a clear understanding of the challenges.

Mary Ellen took the floor first, explaining her intent to update her previous book and her decision to self-publish. She then presented her take-aways of the experience, placing them in an outline called the self-publisher’s Five Ws. Deb followed suit by describing her own experience navigating the self-publishing process as a coauthor and supplementing the Five Ws outline based on that experience. Their insights are summarized under the relevant W.

**WHO are you writing for?**
- **MEB**: Existing client base, new client base, the world
- **DH**: Colleagues, people who want to change

**WHAT are the biggest challenges?**
- **MEB**: Discipline over an extended time, meeting deadlines, making all decisions, and getting a good editor, copy editor, and graphic designer
- **DH**: Working with a coauthor, making the time to write, choosing a title, finding the right mid-career (unpaid) interns and editors, doing so much of the work oneself (design and layout), and revision control

**WHEN do you have time to write and market?**
- **MEB**: Commit to writing evenings, weekends, and stolen hours during the week, and to marketing the public, groups, bookstores, the press, and reviewers
- **DH**: Make the time to write and sell or it will not happen (by setting goals, meeting deadlines, and exercising self-discipline), make time to market across channels (webinars, book-signings, social media), and make time to obtain reviews for the back cover and foreword

**WHERE do you get your book published?**
- **MEB**: Evaluated feature options (printing, ebook conversion, distribution, order fulfillment), used the tools CreateSpace for print and Kindle Direct Publishing for eprint (both Amazon.com companies), and after considering self-publishing options elected to create a new company called Niwot Press and publish under that name
- **DH**: Evaluated feature options (print, eprint, analytics, reports, direct sell, distribution, website), used CreateSpace for print, and after considering self-publishing options elected to publish under her own company’s name, Information Edge

**WHY are you self-publishing?**
- **MEB**: Independence, creative / viral marketing, speed to publication, increased income, easier to promote
- **DH**: To retain creative control, keep the book price as affordable as possible, increased income, speed to publication

Mary Ellen offered additional comments on why not to pursue self-publishing (including the heavy marketing responsibility, the name recognition required for promotion, and out-of-pocket expenses hovering around $5,000) as well as a timeline/checklist for self-publishing.

Deb also described how she and her coauthor identified the existence of a viable market niche by eliciting workshop feedback and through a competitive intelligence scan of published books. In addition, she stressed the importance of setting up a (joint) checking account that accepts payments for the book.

Both authors commented on the need to obtain an ISBN and that they used Evernote for version control. They encouraged anyone interested in self-publishing to do background reading before jumping in. And they stated unequivocally that, despite the challenges of self-publishing, they would definitely do so again.

Mary Ellen’s slide deck for her portion of the session can be accessed at batesinfo.com/extras/files/Author-AIIP-2015-by-Deb-Hunt.pdf. It includes the timeline/checklist mentioned above as well as recommendations for essential reading. You can also follow Mary Ellen at reluctant-entrepreneur.com. Deb’s slide deck for her portion of the session can be accessed at www.informationedge.com/wp-content/uploads/2015/05/Author-AIIP-2015-by-Deb-Hunt.pdf. Deb’s book, The Librarian’s Skillbook, can be ordered at www.librarianskillbook.com or via Amazon at amzn.to/1hHiVYI.

Deirdre Black is the founder of AMERICAN BLACKSHOE Heritage Research & Interpretation llc located in Missoula, Montana and online at www.americanblackshoe.com.
In this session, Jennifer Burke warns against simply leaving the content of the marketing message for your business and services up to others. Instead, she recommends building a referral kit that includes everything you need to make word-of-mouth marketing effective. June Boyle of CeRCo Research & Consulting (and AIIP president) introduced the speaker and facilitated the Q&A.

Jennifer opened the session with some compelling statistics from various sources:

- Getting new customers costs 7x more than keeping them
- 54% of B2B buyers are influenced by word-of-mouth
- 83% of clients are willing to make referrals—but only 29% actually do so
- Consultants state they spend most of their marketing time on referrals (21%) which generates the greatest monetary rewards of all marketing efforts (36%)

She then posed a few questions to the participants to see if those in attendance had acquired new clients through referrals and made referrals themselves. She also asked about systems for follow-up and for getting new referrals. Finally, she asked why we were not getting (more) referrals and took a few moments to explore the things that prevent us from starting the referral machine and keeping it going.

Her recommendation is to create a system whereby people serve as the fuel for the referral machine and follow-up as the engine. People come to know, like, and trust a service provider, making them more likely to buy those services and/or recommend them to others, thus creating more referral sources to serve as fuel for the machine. Systematic follow-up ensures that the fuel is always flowing back in.

Jennifer’s concept of a referral machine includes:

- Fuel: Identify ideal clients and ideal strategic partners (people who are clear as to what you do and so can provide targeted referrals and effective buzz for you)
- Funnel: Grow your sphere of influence so you can add fuel to the machine
- Systems: Build a toolkit (to get organized, find your fuel, and create a referral widget)
- Engine: Follow-up (reach out, deliver value upfront, build relationships, make it easy for others to refer you, be consistent)
- Toolkit: Use it to take action to keep the machine running (move the fuel through the funnel and the engine of the referral machine, then repeat)

Ultimately, the toolkit is an essential bundle of software, services, marketing materials, templates, planned strategies and actions, and follow-up activities specifically created to get the most out of a network of past and current clients, strategic partners, prospects, and other contacts. It will facilitate easier conversations and deliberate engagement (e.g., an email system in action) when seeking referrals.

To assist participants in the development of a toolkit and implementation of a referral marketing machine, Jennifer has posted a link to the slides of her presentation as well as a zip file that includes a toolkit workbook, email templates, and testimonial templates. She also generously provides links to her guides for writing online content. These can be accessed at www.intellicraftresearch.com/aip15referralmachine.

Deirdre Black is the founder of AMERICAN BLACKSHOE Heritage Research & Interpretation llc located in Missoula, Montana and online at www.americanblackshoe.com.
This session was introduced by Marcy Phelps, who has years of experience subcontracting business, and even more these days in her background investigation business. Jocelyn Sheppard and Carey Lening led off with a case study, sharing their experience as a team and giving particular detail about red flags to watch for in order to avoid taking on projects that have a poor chance of pleasing the client. I appreciated their honesty, and how they also shared their feelings.

Jocelyn found Carey through AIIP: she was so impressed with Carey’s technical comments on AIIP-L that she called her in for project work; the rest is history. They are a complementary team. Jocelyn brings technology commercialization and marketing, while Carey is a technology geek with enterprise software solutions experience.

Jocelyn (contractor) and Carey (subcontractor) spoke frankly about their experience on a trying project. The client was difficult to deal with, and the warning signals were several:

• The client had a firm vision of what he wanted to do. He was not open to new ideas—most especially not from an outsider.

• The client had a full-time job, and was doing this project on the side. He expected a quick turnaround.

• Like many with a quick turnaround who are less focused on the work, he did not clearly explain what deliverables he expected. Consequently the team had to redo some of the work.

• The team had never worked with this client before so didn’t know his mode of conducting business. For example, he didn’t like direct communication, which is Carey’s natural inclination. He wasn’t great at dealing with young people, so this was another challenge for Carey, who is young. These factors also presented challenges for Jocelyn, who needed Carey’s expertise to complete the project.

Carey’s attitude and takeaways as a subcontractor were spot-on.

• Communication is key in all phases of the project.

• This is not just the contractor’s project. It’s shared both ways. Both parties are putting in effort and both need to be providing value.

• Understand relationships: If you’re a subcontractor, you’re not the lead. The client is the contractor’s. Be humble; recognize what a great opportunity this project gives you; be grateful. Treat the contractor as your client.

• Make the lawyers happy. (In addition to being a technical guru, Carey is a lawyer.) Make sure you have statements of work and subcontractor agreements in place before launching into projects.

The project did get done, and though the client was three months late in paying, Jocelyn still paid Carey when her portion of the work was completed. More projects are continuing, and Carey feels she gets much learning experience from Jocelyn in each project. The two are a strong, successful alliance.

This chart from Marcy’s talk sums up the benefits to all parties in subcontracting:

### Successful Subcontracting: Everyone Benefits!

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<thead>
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<th></th>
<th>Contractor</th>
<th>Subcontractor</th>
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<tbody>
<tr>
<td>Richer product</td>
<td>Added value to projects</td>
<td>Learn new skills</td>
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<tr>
<td>Faster service</td>
<td>New services/products</td>
<td>Increase revenue</td>
</tr>
<tr>
<td>Single point of contact</td>
<td>Flexibility / availability</td>
<td>Make new connections</td>
</tr>
<tr>
<td>Trusted advisor</td>
<td>Better vendor/service</td>
<td>Better vendor/service</td>
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<td></td>
<td>provider to clients</td>
<td>provider to clients</td>
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<tr>
<td>Bigger projects</td>
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<tr>
<td></td>
<td>Increase revenue</td>
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</table>
Two of my favorite points from Marcy’s talk indicate the cooperative spirit and relationship building of successful subcontractor alliances:

- Some contractors refer to subcontractors as “associates” and “team members.”
- Communicate early and often: before, after, and during the project.

Communicate Early and Often: Tips for the Contractor

Communicate goals: Both the client’s goals and your goals as the contractor for the project.

Share expectations: This includes deliverables, timeframes, and payment.

Changes: If there are project changes, let the subcontractor know immediately.

Quality: Since we all work differently, be open with your subcontractor about how you work. There is a fear of disappointing (subcontractor) or being disappointed (contractor). Learn how to give and accept honest feedback. Also think: Is this something I really need to address in my report?

Process evaluation/refinement: Take time at the end of the project to review what could have gone better and how to change for the next time. Do this with the subcontractor too. Also include what went well, so you continue with best practices, and build your relationship with each other and the client.

Look for presentation slides on AIIP’s website in the near future.

Ellen Naylor leads The Business Intelligence Source, a primary research collection and analysis firm. She is finishing her first book, Win, Lose or Draw: How to Grow Your Business through Win/Loss Analysis.
Our featured speaker was Samantha Bennett, the creative force behind The Organized Artist Company, which provides “a secure, structured, goal-oriented environment for artists.” Through her website (theorganizedartistcompany.com) Sam specializes in personal branding, career strategies, and small-business marketing.

A working actor, writer, and teacher in Los Angeles, Samantha has also written several plays and is an alumnus of The Second City in Chicago. With 12 years as a professional Personal Branding Specialist with Sam Christensen Studios, Samantha helps people recognize and capitalize on their own brilliance.

She provides group and private workshops and is the author of Get It Done: From Procrastination to Creative Genius in 15 Minutes a Day. Her book provides exercises, true stories, and bonus online features to help the readers shift their thinking and harness their energies in positive, productive, and income-generating ways. Her feature presentation to AIIP was based on Get It Done.

Samantha guided us through a discovery process to learn what is essential to achieving success: what we really want to do and who we really are. By finding our unique answers, we could identify the projects that are truly important to us and worthy of our time, and appreciate the strengths that we bring to those projects.

Samantha shared one of her key worksheets designed to help us clarify our preferences and to weed out what is just not that important to us right now. This simple exercise brings what we really, really want to the top of our priority lists so that we can recognize our greatest passions. A couple of AIIP members shared their preference lists to demonstrate how what shines most brightly might be unexpected.

The second exercise Samantha shared with us involved building our unique creative families of inspirational heroes. We identified people—famous or not, living or not—and the qualities that each of those people possesses that make them heroes to us. What those qualities can reveal was a surprise to the audience and a reason for you to read the book for yourselves.

How do we get from procrastination to creative genius in 15 minutes a day? Sam promised that if we schedule just 15 minutes every day for the projects we identified as most important, we would move forward and see significant progress. She does not guarantee the outcome, but she can promise that if we don’t start, our projects will never be successfully completed.

Sam works with artists of all types, and that includes entrepreneurs, who want to be creative in how they build their businesses. She inspired us to think more creatively to clear away the clutter and envision our own personal success.
Peter Derycz is a serial entrepreneur who clearly loves what he does. His high-energy talk began with a tribute to Roger Summit and Eugene Garfield, who, he said, in all sincerity, “changed the world.” Peter established a connection with the audience at the outset saying how excited he was to be speaking to people just like himself, and then went on to describe the sweep of events that took him from setting up as a solo entrepreneur to running a global business.

He set the context with a personal history. His parents were both immigrants to America—his father from Ukraine, and his mother, from Mexico. His father grew up poor and uneducated. Having lost his own father at a very young age he was sent to look after the neighbour’s cow to earn food for the family. He was captured by the invading Germans as a teenager and survived many hardships, including labour camps, a series of refugee camps, and being drafted into the French Foreign Legion. He eventually made it to California, where he met Peter’s mother, who was working as a nanny for a Mexican doctor in California, hoping to learn English, so she could return to Mexico and work as a bilingual telephone operator. After 13 years of marriage, his parents separated, and his mother took Peter and his sister to live in Mexico.

Uprooted from the familiar, the siblings had to adjust to a new school, new language, and new culture. Here, Peter got his first glimpse of entrepreneurship in action. His mother brought home boxes of baby chicks from the market, and after three months of hard work vaccinating, feeding, and tending the birds, she sold them at a profit. In time she started a cafe, which Peter and his sister helped staff, after school. A few years later, however, the Mexican economy went into recession, so his mother pulled up their roots once more and transported the family back to America.

Though this meant another adjustment to the local culture, the nuns in his Mexican school had instilled a certain discipline in him, and his teachers in California were quite relieved to have a student who worked, who didn’t do drugs and slack off, and who was polite. He did well academically and that, Peter said, helped him get into UCLA. At University, Peter got a work-study job for a Harvard-trained geneticist. To a great extent the job involved photocopying articles from the vast UCLA biomedical library—sometimes having to attend to requests for reprints that came from around the world. It became his “petri dish for a business idea.”

When the work-study job ended, he still needed to earn money for his tuition and living expenses, so he bought a typewriter for $130, and drawing upon typing skills learned while at his school in Mexico (he could type faster than anyone, he boasted, in spite, he said holding up his hand, of having lost a finger in an accident in Mexico), he earned money typing term papers for a fee, advertising the service with flyers that read “Do you need papers typed? 50 cents a page. Call Peter. Phone: ....”

On his next work-study job, he discovered that the biomedical library that had so impressed him was only one of sixteen libraries at UCLA. In the process of copying articles for his professor, who did research on migration across borders, he learned how to do research on every subject. He later turned this knowledge into a business. His flyers now read “Do you need to know something about anything? $10/ hour + expenses. Call Peter. Phone: ....” He got a steady stream of requests. The problem was, however, this could not scale; he had limited time and resources.

Then the librarians introduced him to Dialog. He provided them with so many requests for documents that they showed him how to do the searches himself. This, he found, allowed him to do ten hours of work in two hours—“Thanks Roger!” he called to Roger Summit (founder of Dialog), who was seated in the audience.

Business grew. As people got the articles, they wanted more. Peter had to define a more tangible pricing structure, because people wanted a better estimate of costs. So he started pricing at 85 cents/article + 10 cents/page. Now he started employing others to get books off the shelves while he focused on the articles.
He bought a scooter and “his first office,” he said with a swagger, donning the “info-vest”—which was the office—with numerous pockets for pens, pencils, paper clips, photocopy card, rubber stamp with his name and address... and one for M&Ms.

By now he was making good money (“not just for beer, but for champagne and tequila”). But there was still a problem: “Call Peter.” He was the only one who could ride the scooter, carry the 25 books or more to customers, and photocopy articles.

At this point, he decided to buy a computer and dot matrix printer, and he started printing citations of the articles he delivered, on index cards: Journal name, Title, and Customer name. The index card, he soon realized, became a valued product itself, because it enabled people to locate the articles they had bought.

And then he had a service “productization” epiphany. There were bigger companies in the document delivery business at the time, and they had names: Information on Demand, Information Store, Dynamic Information Corp. So he decided to give his business a name, Infotrieve Systems, and he also started selling articles (still at 85 cents/article plus 10 cents/page) to the bigger services, who were selling articles to their customers at $10 and $15 per article.

Following an experience with a large bad debt, he managed to persuade a friend to invest in his business for $10,000. He contacted Dialog to become a Dialog article supplier called “iMed.” For $2,300, the advertising Dialog provided—sending yellow sheets with his name to all on its mailing list—was invaluable. He became copyright compliant. He got a call from Bristol-Myers for 10,000 articles per year. The citations were incomplete and had to be tracked down, but he took on the task to their satisfaction. Later, his company landed the #1 vendor position with Bristol-Myers for worldwide distribution. That happened on the day his wife gave birth to their first child.

From that point on, Infotrieve moved from strength to strength, raising $15 million, expanding partner relationships, automating the document ordering process, and becoming a global company. In 2003, Infotrieve was sold to a venture capitalist.

The success was the result of “productizing” his service. As Peter described it, going from “Call Peter” to Info-trieve, Inc. provided:

- greater credibility: people buy things, they don’t buy people;
- improved marketability: products are easier to understand than people; and
- ability to differentiate: products have features, functionality and specific benefits.

Furthermore, he elaborated, turning your service into a product helps you become process-oriented, it allows you to customize your service to client needs, and it forces you to innovate to better serve your customers.

Having learned this lesson, when Peter started Reprints Desk in 2006, he went straight to productization, with the introduction of Article Galaxy, its journal article platform which offers seamless access and integration with client workflows. It has been very successful; Reprints Desk is now larger than Infotrieve. While it took Infotrieve 25 years to get to this point, it took Reprints Desk only seven.

Crystal Sharp, co-owner of CD Sharp Information Systems Ltd., is a grant writer, researcher, and consultant who works with academic and clinical researchers on grant funding applications and manuscripts.

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**A Big Data Guide for Librarians and Information Professionals**

*The Accidental Data Scientist*

**Amy Affelt**

“Big Data” is not a new concept for information professionals, but it is spawning new approaches along with a language all its own. In *The Accidental Data Scientist*, Amy Affelt shows information professionals how to leverage their skills and training to master emerging tools, create new opportunities by embracing their inner data scientist.

For more information or to order, visit infotoday.com.
Lean Startup

Presented by Jan Knight, Bancroft Information Services

Reported by Scott Attenborough, Content Capital

Jan Knight, Bancroft Information Services (www.bancroftinfo.com), often gives presentations and advice to start-up and early-stage companies. She provides research and writing services to deliver insights to her customers. She also helps companies develop strategies and tactics to enable those companies to succeed whether they be in start-up phase or an existing company looking for growth. At the 2015 AIIP conference in Irvine, California, USA, she presented Lean Start Up Methodologies to a group of very interested and involved independent information professionals.

This session helped attendees understand how businesses use lean methodologies to build products and services more quickly and efficiently. This methodology is tailor-made for independent information professionals and solopreneurs who want to get ideas out of their head and into the realm of the real, tangible, and profitable.

No idea ever is guaranteed success, however, if the idea never gets off the ground then success certainly is not possible. The smart developer knows that initial ideas are almost never perfect. If you try to reach perfection with your first take on a product you will spin your wheels forever trying to define that perfect product or service. You will never be satisfied and you will never get your product to market.

We learned one of the most important aspects of the lean startup methodology is that the concept and the execution do not have to be perfect from the outset. The process is iterative. Each stage or cycle brings new insights to the direction of the development. You produce, analyze, and continually move toward perfection. You don’t try to get the perfect product on the first shot. This is important because what you might have considered perfection in the very beginning may not be what you consider perfection by cycle two or three or four. Each step in the process is informed by the previous step.

One of the principle concepts of Lean Startup is the pivot—a strategic move in a new direction based on customer feedback. The pivot is designed to put a company on a path toward developing viable and sustainable business. Pivoting differs from bailing out or jumping ship in that you internalize and learn from the lessons uncovered in your customer research as you explore a different direction. You just get better results this way.

If you struggle with getting your concept or service off the ground you should really consider how lean startup methodology can get your project running in record time.
In addition, not expecting perfection from the outset frees your mind to look at more creative ideas or paths. Think about the first step. When you finish that first step evaluate where you are and consider your next step. You will see that things start coming together rather quickly and before you know it, you will have what is called a minimum viable product (MVP) that you can test with potential customers. You can take that to the bank.

Here are some resources Jan suggests to inform your thinking on Lean Start Up:

- **The Lean Startup: How Today’s Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses**, by Eric Reis, September 2011
  theleanstartup.com/book

- **The Lean Startup**
  www.theleanstartup.com/principles

- **Lean Start-up Changes Everything, in the Harvard Business Review**
  hbr.org/2013/05/why-the-lean-start-up-changes-everything

- **The Five Whys**
  www.startuplessonslearned.com/2008/11/five-whys.html

- **Lean Stack**
  leanstack.com/LeanCanvas.pdf

Jan’s conference session gave us all something to think about when we turn our minds toward productization and service delivery.

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**Crack the Code: Aligning Your Services with Manufacturers’ Needs**

Presented by Karen Klein, Fulcrum Information Resources

Reported by Michele Bate, Archer Van den Broeck Limited

In her succinct and informative Tips on the Terrace session, Karen Klein gave us three key pieces of advice for dealing with clients in the manufacturing sector.

First of all, we should meet manufacturers “on their terms” and not assume that we are confined to one entry point within an enterprise because of our own particular niche. Think mix and match in terms of the various departments and potential opportunities. As examples, Karen cited a research and development team that wants to identify standards used by competitors, rather than the more usual marketing department. Or an operations team that wants help with recruitment, rather than the human resources department. In Karen’s words: “Don’t limit yourself; see where you can get in.”

Secondly, we should leverage a manufacturing client’s own resources. Do not assume that clients know what resources they have access to within the organisation or that they are already using the best resources for the job. Manufacturers often belong to many trade associations but may not use or even be aware of all the benefits they receive. They may subscribe to numerous trade journals but not actively read them. There can also be a silo mentality within enterprises. Karen’s advice is to ask for log-in credentials to access member-only sections of association websites and journal archives. Contact journalists and editors to obtain additional information and figure out who are the right people to talk to within trade associations, regulatory bodies, etc. The personal touch leads to success: call sources up, as people love to show off their knowledge. You may be able to obtain unpublished raw data for example, or a referral to another expert. But be prepared to barter non-proprietary information in return.

Karen’s third tip is to “Listen, write, and guide.” Listen mindfully to the client’s professed needs, write a proposal that plays to your strengths, and be prepared to guide the client. She cited the example of a manufacturer who simply said “We want to go green.” After first defining the term “green” from the client’s point of view, a proposal might suggest researching industry standards relating to the product and to the manufacturing process, benchmarking the competition, and providing an assessment and recommendations for next steps. Karen advises using a phased approach, to avoid “sticker shock.” Phase two will be based on the results of phase one.

Karen’s company Archer Van den Broeck Limited is based in Northampton, England. She helps her clients to know who they are dealing with, whether they are investing in a company, making a senior hire, taking on a new supplier or client, or involved in litigation. Contact her at mbate@archervandenbroeck.com.

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**Document Layout and Appearance: The Evidence We Leave Behind**

Presented by Ulla de Stricker, de Stricker Associates

Reported by Maureen Shields, 42nd Street Group Inc.

For her Tips on the Terrace session, Ulla de Stricker provided a handout entitled, “Document Layout and Appearance: Evidence!” to help us prepare clean and professional documents for our clients. She emphasized that information professionals are in the communication business and our reports, project proposals, letters and other similar items leave behind a trail of visual evidence that reflect our expertise and competence. Ulla offered numerous tips to “remove obstacles” and produce clean and sharp documents that signal to our clients that we care about making their reading experience as effective as possible. Five broad areas were highlighted where a little bit of extra attention reaps great rewards.

- Using “options” for text appearance and arrangement such as deliberately choosing a modern font; using graphics conventions to provide structure; applying consistent heading sizes; using appropriate justification for prose and table cells; and the clever trick of adjusting font
AIIP’s Tips on the Terrace (cont’d)

Finding Your Niche: Aligning Your Expertise and Passion with Market Need

Presented by Jan Sykes, Information Management Services, Inc.

Reported by Dianne Stubbs, DLS Information Services

Jan discussed possible avenues to finding one’s niche—whether by accident, personal experience, situational need or long-term dream.

Sometimes we become aware that we possess a specific skill or capability that can become our niche. A personal experience coupled with the desire to give back may lead to discovery of a passion, or we may find ourselves in the “right place at the right time” and capitalize on the opportunity. As an example, Jan recalled reading an interview with famed car designer, Giorgetto Giugiaro, who said, “Only fate led me to be a designer.”

Family priorities or an economic necessity may also lead to a narrowed focus. Long-term dreams and goals often lead to specialization.

Benefits of embracing a niche include developing experience and expertise and the advantages of focused marketing. One may attain recognition in the niche area, allowing establishment as the authority in that specialized market.

On the flip-side, the benefits of being a generalist include variety, flexibility and the opportunity to acquire a breadth of experience and knowledge. New opportunities may allow for the development of expertise in a new area. A disadvantage of being a generalist is that it is often difficult to explain to those who are not familiar with the field.

Are you a generalist, or have you found a niche?

Diane Stubbs is the principal of DLS Information Services, where she provides her clients with litigation support, public records searches and helps her clients avoid “decision regrets”. Contact her at Diane@DLSSinfo.com.

Working On Your Business, Not In It: E-Myth Principles That Work for Info Pros and Some That Don’t

Presented by Cynthia Lesky, Threshold Information, Inc.

Reported by Dianne Stubbs, DLS Information Services

Cynthia told attendees this session was inspired by the challenges of being a solopreneur. When she decided to change focus in her business, she took on a new role. “I gave myself a new job,” she said. “I thought I knew a better way to do things.”

She shared information gleaned from Michael E. Gerber’s book, The E-Myth Revisited: Why Most Small Businesses Don’t Work and What to Do About It. In reviewing Michael Gerber’s core concepts, Cynthia reminded attendees that “just because you are good at something, doesn’t mean you can build a business doing it.” Sustainable businesses need three people: the strategist and visionary also labeled the entrepreneur, the pragmatic, organized individual—the manager, and the technician who gets the work done. If these three people or business personas are equally represented, the business will thrive. Another key concept in Gerber’s book is thinking of the business as a franchise and developing a model that can be duplicated. The business should be systems-dependent rather than people-dependent.

Cynthia said she applied five of Gerber’s principles and “it worked very well.” Paraphrasing, Cynthia explained her use of these principles:

1. Your model must deliver value that consistently exceeds customers’ expectations. You must “produce high-value that delights clients.”
2. Model must be totally orderly.
3. Model must be documented.
4. Model must deliver service that is uniform and predictable.
5. Model must have a totally consistent color, reporting appearance and style.

She disagrees with Gerber’s principle that suggests your model must be capable of being operated by people with low skill levels and chose not to put that principle into her model.

Consistency in experience is important. “You want the [customer’s] second experience to be like the first.” To accomplish this, she “fixated on de-
Changing the World by Doing Our Jobs

Presented by Katherine (Kit) Brown-Hoekstra, comgenesis, llc
Reported by Debbie Wynot, Insight Matters

Kit Brown-Hoekstra began her tips session with a roundtable question: what are we doing that could Change the World? Bam! Nothing like starting off with a big one, is there? One by one, table attendees related actions that ranged from the mundane to lofty ambition. A couple of members were stunned enough by the opening question to express that they weren’t qualified to answer. That would soon change.

The next tip step was to expand on the types of change possible with corresponding examples:

- Big – the Internet, space travel
- Small – a hug, getting a puppy
- Plodding – evolution, domestication of animals
- Accidental – Post-it notes, penicillin
- Positive – vaccines, clean water
- Negative – war, oil spills.

Kit then guided us into a discussion of what really matters when making a change. Timing and intention ranked high on her list, as did effective communication. We talked more as a group about how changes that may not have seemed good at the time turned into something great. For instance, many of us experienced layoffs from our 9-to-5 jobs or difficult work situations that prompted us to leave to form our own businesses. Just as easily, a good change may take a bad turn, opening the door to the Law of Unintended Consequences.

The book, Leading a Successful Change: 8 Keys to Making Change Work, by Shea and Solomon, was Kit’s linchpin for a successful work systems model. At the center of change management is a change in behavior.

That change is supported by eight “levers,” at least four of which are necessary keys to success:

1. Organization
2. Workplace design
3. Task
4. People
5. Rewards
6. Measurement
7. Information distribution
8. Decision Allocation.

In the discussion that ensued, session attendees gave examples of how we have used several of these “levers” to effect change with our clients, friends, and family. By the end of the session, Changing the World no longer seemed as abstract or difficult to accomplish. Thanks to Kit for sharing her strategy of change with us.

Diane Stubbs is the principal of DLS Information Services, where she provides her clients with litigation support, public records searches and helps her clients avoid “decision regrets”. Contact her at Diane@DLSinfo.com.
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