In This Issue

Welcome to the September 2015 issue of AIIP Connections. As you’ll soon see from our articles, it has been a busy conference season these past few months.

In this issue, the Member Spotlight is on Lynn Strand of Outside Knowledge.

We proudly present a press release announcing AIIP member Marcy Phelps winning a much-deserved award, as well as an article covering the in-person presentation of the AIIP President’s Award to Marydee Ojala.

Anne Hengehold and Ellen Naylor report on AIIP regional meet-up events in the Chicago, Illinois and Denver, Colorado areas, respectively.

Marydee Ojala reports on the keynote address given at this year’s Special Libraries Association annual conference.

Linda Stacy provides productivity tips gleaned from veteran AIIP members.

Ulla de Stricker and Cindy Shamel write of their best practices for holding a pre-conference workshop.

Chrissy Geluk tells of her experience at SharePoint Saturday NYC the free one-day conference about all things SharePoint.

Patti Peregrine reports on her experiences at The Big Yes Yes!, a three-day conference hosted by Samantha Bennett, speaker at this year’s AIIP annual conference.

Mark-Shane Scale provides the second of his two articles on library consulting: this one focusing on blogs. (See the March issue of AIIP Connections for his first article.)

Jocelyn Sheppard whets our appetite for all things Pittsburgh, getting us ready for the 2016 AIIP annual conference.

In her Coach’s Corner, Amelia Kassel reports on dealing with clients with a case study covering scope creep and kill fees.

Enjoy the September 2015 issue of AIIP Connections.

Joann M. Wleklinski
Editor, AIIP Connections

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Next Issue: December 1, 2015
A NOTE FROM THE EDITOR

It is with a peaceful, easy—and sentimental—feeling that I announce my departure as your intrepid editor of *AIIP Connections*.

I have loved every minute of putting together the favorite quarterly read for our AIIP members, having done so in some capacity since the publication was paper-based, folded in half, stapled, and U.S. Postal mailed to the membership.

But I can’t hog the wheel. It’s time for someone else to drive for a while and have some fun.

Your new editor, Phyllis Smith of ITK Vector Inc., is quite up to the task. Phyllis has served as an *AIIP Connections* proofreader for several years, and has contributed a few articles herself—one winning the AIIP Writer’s Award. She’ll take over as editor with the December 2015 issue.

The publication is running smoothly, with a heartfelt thank you to each of the many people who make it so each quarter without fail (see the masthead).

We have strong contributions each quarter. For that, I have you, the AIIP members, to thank. Each quarter, at the start of the publication process, a quiet panic starts inside me. And yet each quarter, without fail, content—good content—pours forth from the membership.

Thank you. You’ve all been far too good to me. Being editor of *AIIP Connections* has been a wonderful experience.

Fondly,

JoAnn M. Wielniowski

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**Be an AIIP member**

**Volunteer**

**IT DOES AN ORGANIZATION (AND YOU) GOOD.**

**VOLUNTEERS@AIIP.ORG**
I recall when I first started up my own business it was summer, and I was incredibly busy juggling a number of clients. At one point, at 3:00 AM, as I was writing a report, having just turned down an invite to go to the country for the weekend, I stopped writing, shook my head, and asked myself “What are you doing?”.

One of the key reasons I had chosen to be my own boss was so I could have a more balanced life than I’d had during my corporate career. I knew the first years of building my business would be intense ones. So here I was, doing interesting work and making good money on my own, but putting in the same crazy hours and still having no time for anything or anyone else in my life. I hadn’t even had time to launch my own website. This certainly wasn’t the way to start off my independent professional life.

It took me some time to course correct, but over the last few years I finally got into a good rhythm and a manageable pace. Recently, I’ve been quite occupied with not only my AIIP President role but also some clients who are keeping me incredibly busy—so much so that I’m starting to get that same “what are you doing?” feeling again. The ironies that it is summer, with all its opportunities for fun, and my website is still in serious need of updating are not lost on me.

However, this time around with the “what are you doing?” question, I am now a member of AIIP—and it’s made all the difference. When I first ventured out on my own, I hadn’t heard of AIIP; I didn’t join the association until well into my first year of business.

Here is how AIIP’s many benefits have helped me balance my time while still helping my clients during this very busy period:

1. The Member Directory and AIIP-L. Certain streams of work on a recent large project required industry-specific knowledge that I didn’t have. Rather than try to quickly ramp up the learning curve and do all the work myself, I searched the member directory for members with the skills needed, and also sent out a note to AIIP-L. I was able to quickly staff the project with qualified AIIP members.

2. Vendor Discounts. I was able to meet the needs of another client by getting access to sources I hadn’t used before but were available through AIIP’s vendor discount program. I can’t speak highly enough about the customer service I received from our vendor account managers. They made things turn on a dime, and went the extra mile to ensure I had what I needed.

3. Learning Events. At past conferences and webinars, we have learned how to best manage projects or be subcontractors. Working on my own for several years and feeling like my project management skills were getting a bit rusty, I downloaded a few pertinent AIIP webinars from the archive to listen to. I now know which pitfalls to avoid going forward.

4. Resources for my Business. Many of our fellow AIIP members can help us with our businesses. That pesky website that’s been hanging over my head—and bugging me just when it’s summer and I’m overwhelmed? Well, I happen to know an AIIP member whom I recently hired to get the site revamped—and now I don’t have to.

5. In-the-Moment Guidance. When I ran into a challenge with one of my projects, I happened to be with a fellow AIIP member. It was so helpful to be able to simply talk to her, use her as a sounding board, and then get some good advice on how to proceed. Fortuitously, she was struggling with a different type of challenge with her client at the same time and I was able to return the guidance favor.

AIIP has saved me in quite a few ways this summer. I hope each of you takes advantage of these and numerous other benefits AIIP has to offer. Our volunteers work hard to ensure we all have access to great resources to help us build, maintain, and grow our businesses. Be sure to check out those resources on the AIIP website at www.aiip.org/Join/Benefits.

Don’t hesitate to reach out to me at june.boyle@cerco-research.com.

Cheers,

JMN
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**Welcome AIIP’s Newest Members:**

- Paul Aljets
- Joy Banks
- David Behling
- Lee Ann Benkert
- Christopher Cochran
- Katherine Coolidge
- Melinda Crosby
- John Cruickshank, University of Georgia
- Francisco Cueto, Francisco Cueto
- Christina Evans, Evans Research Solutions
- Christine Geluk, Librarian At Your Service, LLC
- Valeria Hunter
- Kyle Kendall
- Kerry Kushinka, PharmIntell Consulting, LLC
- Elizabeth Lamoreaux
- Abigail Ross, RoFinCo, LLC
- Aaron Silverman, SOS Security
- Stanley Siranovich, Crucial Connection, LLC
- Sarah Ward
- Jennifer Ward
- Mark Worthy

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When I told my mother I was going to graduate school to become a librarian, her response was “What took you so long?” I was 31.

My journey was indeed a long one. I received my undergraduate degree in Anthropology, at age 30, then almost immediately applied to grad school for my MLIS. The whole time I was in school, I was also juggling my kids, part-time work, and a chronic illness. Needless to say, I’m an accomplished task juggler. I tried a few different library jobs while in school: part-time book shelve at a chiropractic college; graduate faculty assistant on a research project; practicum in the knowledge center at an ad agency; and a contractor for a consumer insights firm, finding interesting consumer trends on the internet.

I attended my first AIIP conference in 2007 in Minneapolis as a student, a few weeks from graduation. What a breath of amazing air; I felt like I had found my tribe, finally. I knew I had chosen the right profession. I still wasn’t clear on how to be a new-fangled librarian, but I knew both AIIP and SLA were going to be extremely beneficial.

I was lucky enough to land a temp to full time position as Knowledge Manager, at a consumer insights company. I provided my team with research in all areas of the consumer world. What a breath of amazing air; I felt like I had found my tribe, finally. I knew I had chosen the right profession. I still wasn’t clear on how to be a new-fangled librarian, but I knew both AIIP and SLA were going to be extremely beneficial.

I let AIIP go for a while, got more involved in SLA, and started juggling full-time work, my chronic illness, and my mothering duties. It was working, until early 2015. I was feeling uninspired and my health was being affected. It was time to make a radical change in my life.

With the support of my new husband, my family, my friends, and some very special AIIP folks, I left my job and focused on rebuilding Outside Knowledge, a market intelligence practice dedicated to supporting clients in finding, analyzing, and using the critical information they need to be successful. One of my new clients told me I have “the superpowers to get behind the Google.” Best testimonial ever.

Outside Knowledge is still a work in progress, but attending this year’s AIIP conference was an excellent way to connect with old colleagues and meet some great new ones. 2015 is about building the business and I’m quite busy with it. I gave a presentation at SLA in June, I’m on a panel at Internet Librarian in October, and I’ve landed some projects, joined a Mastermind group, given advice, written some articles, and built a website.

My health is vastly improved, my quality of life is improved, and my work-life balance is improved. I would say that 2015 has been a journey. A much shorter and faster paced journey than my educational journey, but it sure has and will continue to be… a great ride!!

Lynn Strand is the principal of Outside Knowledge. Contact her at lynnstrandok@gmail.com.
The 2015 AIIP President’s Award Presented in Indiana
By Joann M. Wleklinski, Wleklinski Information Services

Recently, AIIP members met in Indiana to make a post-conference award presentation. On Saturday, August 8, 2015, Susanne Bjørner met with Marydee Ojala in a Carmel, Indiana, restaurant, just outside of Indianapolis, to present Marydee with her much-deserved AIIP President’s Award. (Marydee was travelling at the time of the original awards ceremony, in April at AIIP’s annual conference in Irvine, California, and unable to attend that event and the presentation of her award.) Also present at Saturday’s Indiana lunch gathering were the respective spouses, as well as Joann M. Wleklinski, past secretary of AIIP and current editor of AIIP Connections, AIIP’s quarterly publication.

With her presentation, Susanne repeated most of what had been said at the original awards ceremony: “Today’s recipient is a very high-profile person with a very down-to-earth presence. When called upon, she responds with directness, practical solutions, and good cheer. She’s been a mentor and an advocate for AIIP and all information pros. She’s been an excellent brand advocate throughout the information industry for many years. As a leading authority in the spheres of information access, information policy, and information technology, this person has made so much brilliance reach farther. She’s given many AIIP members space to shine in print and online. She’s been described as a public and a private force for good on AIIP’s behalf. Of course, this paragon could only be the inimitable Marydee Ojala. In the words of one of our board members, ‘Marydee rocks!’”

Marydee graciously accepted the award and expressed her sincere gratitude for it, and her deep appreciation for AIIP, saying, “I am thrilled to receive this year’s AIIP President’s Award and very honored to be among the extremely influential AIIP members who are previous recipients of the award. Thank you.”

The Marilyn Levine AIIP President’s Award recognizes an individual or organization that has demonstrated extraordinary support of the objectives of the Association. It doesn’t come with a cash stipend. It’s not quite a fellowship. It’s part of a tradition of thanks. It signifies deep appreciation for significant and lasting contributions to the Association.

Marcy Phelps

On May 1, 2015, the Business Marketing Association Colorado (BMA Colorado) announced the 2015 Gold Key Award winners during its gala at Denver Museum of Nature and Science. The night’s accolades included recognizing Marcy Phelps, president of Phelps Research, with The President’s Award for her dedication to and impact on BMA Colorado. Marcy has been an active member of BMA Colorado for more than 10 years and most recently served on the board as VP of Professional Development.

Marcy is a frequent speaker and writer on a variety of topics—from business due diligence to subcontracting success. She is the author of Research on Main Street: Using the Web to Find Local Business and Market Information, published by Information Today, Inc. Marcy also contributed the chapter “From Zero to Strategy: Mining the Info-Sphere for Market Insights” in BMA Colorado’s book, Advice from the Top: The Expert Guide to B2B Marketing.

Marcy earned a Bachelor’s degree in Mathematics from the State University of New York at New Paltz. She started Phelps Research in 2000 after completing a Master’s degree in Library and Information Services from the University of Denver. She also holds a Colorado Private Investigators license.

Marcy Phelps works with investment firms to help minimize risk. Her company provides due diligence background investigations that tell the real story about the people and companies behind potential investments—and Marcy’s goal is to prevent the next Bernie Madoff.

AIIP Chicagoland

By Anne Hengehold, Clarify Information Services

The conversation began at the AIIP annual conference in Irvine, California last April—with American Midwesterners expressing a wish for more ways, beyond the conference, to connect face-to-face throughout the year.

Using the AIIP member directory, organizer Anne Hengehold collected the contact information of all members in the extended Chicago metro area (which reaches into Indiana and Wisconsin, as well).

Two Doodle polls later, a weekday evening in a centrally-located restaurant was chosen. For the first meet up (on July 14th), Jan Sykes, Tom Wolff, potential member Valeria Hunter, and Anne Hengehold spent two hours meeting, reconnecting, and sharing tips on getting started—both starting one’s own business and starting more meet-ups.

Another gathering will be coordinated in the fall. If you’d like to be added to the AIIP Chicagoland list, please email Anne Hengehold (anne@clarifyinfo.com).

Anne Hengehold is the principal of Clarify Information Services. She can be reached at anne@clarifyinfo.com.

(L to R): Jan Sykes, Tom Wolff, Valeria Hunter, and Anne Hengehold

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**AIIP Local Meet-Up: I-25ers in Denver, Colorado**

By Ellen Naylor, The Business Intelligence Source

We had a great I-25er’s meeting in Denver in July. Renee Meade had the brilliant idea of hosting our meeting at the Egg & I, a local restaurant. It worked quite nicely since the venue was quiet, and none of our members had to deal with preparing food—leaving us with more time to connect and share information with one another.

Our mission was to share some nuggets we had picked up at AIIP’s and/or SLA’s annual conferences, and if you didn’t attend either, a nugget you learned since our last meeting. Here are a few of the meeting’s highlights:

Lee Ann Benkert shared that many talks at SLA centered on learning how to think like your customer. One presentation she particularly appreciated was Habits not Hype: Startup Thinking 101 by M.J. D’Elia from the University of Guelph. We especially enjoyed D’Elia’s tagline: “Monitor usage; decide with data.”

www.slideshare.net/mjdelia/habits-not-hype-startup-thinking-101

Another well-attended SLA seminar was on communicating with the C-suite given by SCIP veteran, Scott Leeb, who has spoken about and been successful in connecting with execs for years. www.sla.org/wp-content/uploads/2015/06/1443_Be-Bold-Be-Brief-and-Be-Gone-Leeb.pdf

Jane Langeman related that she asks vendors at conferences: “What should I know about you?” — which, she says, really gets them talking. So clever, so simple. Jane’s takeaway from the AIIP conference, now that she is AIIP President Elect, was how other associations want to collaborate with AIIP, in particular partners for programs and other synergies.


Renee Meade, an information professional historian, is a Historical Information Services professional at the Westminster Library. Renee is using her information services skill in a volunteer position which will take her to London for three months in her almost lifelong association with the Girl Scouts. She is also certified to teach English as a second language (ESL). While her story is unique, it is interesting how our background as information professionals can be put to use in so many ways.

From the AIIP conference, I shared Cynthia Lesky’s wisdom about running your business. Too many of us are doers and entrepreneurs, but don’t spend enough time on our business strategy. Cynthia suggests we split our time equally among being a doer, entrepreneur, and strategist. Her point spoke to me, personally, having been self-employed in my business for over 21 years with not enough strategic thinking happening. Now that I am nearly finished with writing my book, Win/Loss Analysis: How to Clinch and Keep the Business You Want, I am in the process of inventing services and training to complement this deliverable.

Lastly, from the AIIP conference, I appreciated Peter Derycz’s thoughts about “productizing” as he called it. While most of us offer services, he has learned that people like to buy products. He suggests we figure out ways to productize our services, which will give potential customers different and clear ways to engage with you.

Ellen Naylor leads The Business Intelligence Source, a primary research collection and analysis firm, which focuses on competitive intelligence. She is finishing her first book, Win/Loss Analysis: How to Clinch and Keep Business You Want.
Wouldn’t you like to know your customers’ expectations? Not just what they tell you they’re looking for but what their actual objectives are? What they really, really want? When we give them information, what do they do with it? Even though we have diverse businesses, we have one thing in common: Customers. The keynote speaker at the SLA annual conference in Boston, June 14-16, 2015, provided some insights that are applicable, not just to librarians, but to the AIIP community as well.

Leigh Gallagher, assistant managing editor at *Fortune* magazine and self-described research geek, gave a refreshingly honest, informal, almost off the cuff talk, acknowledging how important information professionals are to her in her daily working life. Leigh clearly enjoys doing her own research but perhaps more importantly, knows when to ask for help from the expert. In her case, the expert is *Fortune*’s in-house librarian/researcher.

Given Leigh’s many responsibilities—feature writer, book author, TV show host and participant, and conference organizer—her research needs are many and varied. She frequently needs background information on people and companies to make the interviews she conducts worthwhile. She stressed the need for accurate, comprehensive information from reliable sources.

Some examples of actual research projects should catch AIIP researchers’ attention. To tabulate insurance payouts after a plane crash, her librarian/researcher scoured annual reports for data. He also tracked tail numbers of private planes, found deleted materials, and identified anonymous commentary by triangulating data for Leigh’s other stories. It all sounds rosy, but Leigh cautioned that finding information by deadline can be tough. “With enough time, you can find anything,” she said, but often they don’t have enough time.

Leigh thinks we are moving to a knowledge economy. Big Data is important, but somebody has to analyze it. There’s so much free information that it introduces inefficiencies into the research process. Her advice for information professionals sounded familiar to AIIPers. Market yourself as a value creator. Quantify your value—show, don’t tell. Stay ahead of the curve. Go artisanal and provide a high-end service. Innovate.

Leigh also gave a shout-out to AIIP member Lynn Strand’s Quick Take Session, “What to Do When They Say ‘Give Me Everything You Have on …’ and Not Freak Out Because They Want It in an Hour. Lynn’s first tip was to breathe and not panic. Recognize that your client really doesn’t want everything, just the best and quickest. Know your customer: Tailor your research to their needs. Use resources you have at hand. Break down the project into manageable pieces. Use a flexible template. Provide a deliverable that doesn’t exceed three pages. Use expert search techniques, such as Factiva’s Company Snapshot and Google’s filetype command.

Both Leigh’s and Lynn’s presentations contained practical, usable insights into the research process, from the perspective of the customer and the researcher.

Marydee Ojala is the principal of Ojala Associates and the Editor-in-chief of Online Searcher magazine. She can be reached at marydee@xmission.com.
In preparing for my 2015 AIIP annual conference presentation, How to Optimize Your Productivity and Expand Your Energy to Lead Your Business to New Heights, I interviewed a handful of AIIP veterans—folks who have been in the association a number of years, and have run their information businesses throughout that time. As a productivity coach, I appreciate the wisdom of the most successful among us; what are the brass tacks—daily systems, routines, hacks—these individuals perform to achieve their goals? Robert Collier said, “Success is the sum of small efforts, repeated, day in, day out.” Often the small efforts don’t look like much on their own, but are essential for peak performance.

I asked the interviewees for their initial reaction to the phrase fake it ’til you make it. Thank goodness, all agreed it is never permissible to misrepresent oneself, one’s work, or one’s expertise. About a third really didn’t care for the statement, because of perceived negativity; the other two-thirds felt it’s a mantra to live by. All interviewees understood the need to do these two things when in business: 1) stretch oneself, and 2) act “as if.”

Stretching Oneself

No matter where you are in your business, you can continue to stretch yourself; we are all on our own journey, and it’s exciting to watch the organic nature of business growth. When faced with the opportunity to take on a project like none before, look at the project carefully. How can you break it down? Perhaps you’ve performed very similar work for past clients? Certainly this is where the community of AIIPers is available to assist. Our community is a rich source for great advice—suggestions for approach, key resources, and reality checks surrounding time commitments and feasibility. And, of course, we can subcontract the parts that fall way outside our expertise.

Act “As If”

Begin to act “as if” by visualizing what (who) you want to become. In fact, why not begin to think of yourself (today) as though you already are the best in your field? Then decide: how would this person execute the day? Would he or she begin by sleeping late and sitting in front of the tube? Probably not. Of course, sleeping late and watching TV are not so much the issue—some amount of idle time is also healthy for productivity. I am suggesting that success comes by way of consistent, disciplined, deliberate action, and not by giving in to what we’d prefer to do at any given moment—sometimes we allow ourselves to feel productive by doing what’s easy or fun, and not necessarily what will drive business growth. For the creative (or distracted, or scatter-brained) among us, these muscles (consistency and discipline) might require more training. Here’s the exciting part: you can develop these muscles and create new levels of success at the same time.

AIIP Veterans’ Routines

For ideas on how the best in our field execute their days, here are some ways AIIP vets bring their best selves to their businesses (and lives), day to day:

• They have some form of consistent morning routine.
  - This varied from vet to vet, but many components were the same; the point is to have one that sets you up for success.
• They use visual reminders of what’s important and/or what’s on deck, such as:
  - a list of non-negotiable priorities, and/or
  - a whiteboard of key projects.

• They exercise—nearly all mentioned it.
  - Some exercise early morning/first thing.
  - Some use exercise as a break.
  - The majority schedule their exercise.

### On Transitions

When we return to the office, whether at the end of travel (vacation or conference) or from a networking event, it’s often difficult to jump back in to the work groove seamlessly. Setting up a re-entry plan is as important as the exit plan (all the stuff we do to get ready for the trip). We often return exhausted, both mentally and physically. In order to support yourselves or your businesses, consider—before departing—how you’d like to return.

• About a third of the vets said they jump right back in—their re-entry is seamless.

• The others said they know they need time when they return, so they don’t schedule anything, work-wise, for a day or two.

• When returning from an event where significant information uptake occurred, setting time to process it is key.
  - Decide: when/how will you review and make decisions about the one or two things you want to implement?
  - Brainstorm: what will you do to explore this new initiative, how much time will it take, and what are the initial steps?

• Acknowledge and prepare for your physiology. We need to be fueled and rested in order to perform optimally for our clients. Key for me is having a meal plan set up—I do my best to eat well on the road, but part of the drudgery of the return has to do with my body putting up with the different food, sleep, and energy schedule.

• Additionally, in order to make coming home a bit easier, be strategic about how you spend your time away:
  - Get (plan for) sufficient sleep.
  - Drink lots of water.
  - Don’t feel shame in stealing away for quiet time or a nap.

Perhaps you can tweak your current process with one or two ideas from the above. With anything we want to change and/or do better, shifting just one part can be the beginning of something really great—and also happens to be achievable.

Here’s to living and working seamlessly, with exceptionally high levels of productivity—plus satisfaction.

Linda Stacy teaches corporate audiences, entrepreneurs, and hyper-busy professionals how to use productivity and time management tools to take strategic control of work and life. You can contact Linda at linda@livingblueprints.com, 617-512-9572, or visit her website, www.livingblueprints.com.
Thanks to the AIIP practice of giving members the opportunity to offer workshops prior to the annual conference, we have now made two deliveries of a half-day session focusing on the consultant-client relationship. Spanning the gamut from the earliest potential client inquiry to the post-project follow-up, the topic coverage was designed to provide for a look at all the aspects we ourselves have encountered in numerous engagements, and we structured the workshop to allow for lots of interaction. What has delighted us no end is the incredible value everyone has derived from the discussion format, and we share the “recipe” here in hopes it will help others who may be thinking of offering a workshop.

First off, it was a stroke of brilliance (if we must say so ourselves) to co-deliver the session. Not only do we believe it is more engaging for attendees to watch the two of us take turns making comments; invariably, our back-and-forth conversation brings up details and nuances we might have overlooked had we been doing the session solo. Our consulting practices have similarities yet are sufficiently different that we are able to offer a number of angles from which to view the many stages of an engagement.

More importantly, the dynamic interaction among the participants proved fruitful beyond our wildest imagination. As each attendee raises a question or relates an experience, the others weigh in with their versions of the matter, thus providing a rich and varied tapestry of real life illustrations to inform thinking. Queries such as “what do you do if …?” or “how do you avoid …?” or “is it really necessary to…?” trigger multiple stories to show how a variety of strategies have played out in practice and what end results they produced. The interaction produces a range of answers, solutions, and scenarios, but it also leads to questions and discussion that might otherwise never arise. This informs both the facilitators and the rest of the group in a much richer way than could ever be achieved with a “sage on the stage” format.

Participants attending this workshop have ranged from those in the business-planning phase to some who have been delivering research or consulting services for ten years or more. The interactive format makes it possible to simultaneously engage those at an early stage of their consulting or freelancing careers along with the more seasoned professionals. The more experienced attendees ask questions and share anecdotes that others would not have thought of, while others can remind us of the fundamental business strategies that we all need to work on. That way, everyone has some-

Best Workshop Recipe Ever:
Participants are the Key
By Ulla de Stricker, de Stricker Associates, and Cindy Shamel, Shamel Information Services

Ulla de Stricker
Cindy Shamel
thing to contribute. Naturally, as workshop leaders we subtly direct the conversation so that airtime is as evenly distributed as possible. A multi-page handout showing the topics we are going to cover and containing lots of white space provides two benefits. It offers attendees the opportunity to jot down key points made and it offers us a means of allowing for discussion of what emerges as being of interest to the group while at the same time making sure to cover all the outlined topics.

Typical seating setups for workshops are classroom style. Since we do not use projection equipment or need a screen, we are not locked in to this room arrangement. As soon as we have access to the room, we rearrange it so that we all sit around a large square in a conference table style. When we can all see each other, it is much easier to have a discussion, and the configuration diminishes the sense of separation and lets us perform our roles as facilitators rather than docents.

Feedback from the sessions has been extremely gratifying, cementing the impression we had that the participants gained a great deal of value from each other and came away with practical tips they could use in their own businesses.

In particular, participants have said the workshop was “full of frank, practical, immediately useful advice,” “a great learning experience,” “very informative,” and “just what I needed to know.” These statements are welcome and are music to any workshop leader’s ears. It was no coincidence, however, that the content was targeted and relevant. The interactive format facilitates on-the-spot focus and customization. That is not to say content development is automatic and requires little preparation. On the contrary. An interactive workshop such as “how to win assignments and deliver quality results every time” requires a fair amount of advance thought and planning. For this we spend time thinking about the client engagement process from start to finish. We brainstorm our own experience in the many phases and facets of a project, recalling wins, losses, successes, and learning experiences. (There’s no such thing as a failure.) In doing this we have the opportunity to flesh out the topic with subtopics and real-life examples.

Furthermore, in advance of the workshop, once we have an initial list of registrants, we contact them to ask what they hope to learn or what kinds of challenges they are facing. Responses are typically quite varied, making it possible to fine tune the agenda and be sure we address topics of interest to the particular group. As mentioned earlier, we offer a printed outline of the topics to be discussed. It is not uncommon to have onsite registrations, so it’s wise to bring three or four extra handouts.

Tag team logistics are simple enough. As facilitators we divide up the list of main topics, trading off the role of discussion leader. Phrases such as “have I forgotten anything?” or “do you have anything to add?” invite the co-leader into the discussion and serve as a segue to the next topic.

Discussion-centered workshops always benefit from a 15-30 minute break. In addition to simply giving participants a chance to stretch, it lets them chat informally or follow up on topics touched on in the first half.

The interactive workshop offers benefits to all participants, and we can confidently recommend the format for a high-value professional development experience.

Ulla’s consulting practice, de Stricker Associates (www.destricker.com), focuses on assisting clients in tackling a wide range of tasks and challenges related to information and knowledge management.

Cindy’s business, Shamel Information Services (www.shamelinfo.com), focuses on delivering strategic improvements to knowledge management practices, as well as business research and analysis services.
SharePoint is a web-based Microsoft document management system that provides the platform and tools to organize and distribute content across an enterprise. This summer, I traveled with my husband and partner, a software developer, from Boston to New York to attend the 7th annual SharePoint Saturday NYC, held July 25, 2015. SharePoint Saturday events are free, one-day conferences. They are a great forum for anyone involved in SharePoint, whether you are a developer, business analyst, or end-user. In addition to daytime networking, these events typically conclude with a SharePint at a local bar or restaurant after the full day of sessions and exhibits. This year’s SharePoint Saturday NYC was held in the beautiful Microsoft building just outside Times Square, across from the Port Authority Terminal.

One of the biggest challenges I found with SharePoint Saturday NYC was deciding which session to attend at a given time. Fortunately, the slides of most of the sessions are eventually made available either on the website or through the speaker’s social media posts. Below I summarize the sessions I attended; I encourage you to also review the full agenda at http://www.spsevents.org/city/NYC/nyc2015/sessions for information on other sessions.

Top Tips for Delivering a Quality Project
Kim Frehe

I have attended previous sessions by Kim at SharePoint Saturday, so I knew at the get-go this would be a good one. Kim focused on techniques to use with delivering quality projects; these techniques can be used inside and outside of SharePoint.

• Don’t forget the end user: It is important to understand what the end user means—not necessarily what they say. Sometimes it may be difficult for a client to describe what they need or want. Kim gave suggestions on getting at this information through the use of techniques described in the book *Innovation Games*, by Luke Hohmann (Addison-Wesley, 2006).
Avoid Analysis Paralysis: It is important to prioritize and document what will be out of scope in addition to what will be within scope. Doing this tends to avoid what is known as scope creep. Have everyone sign off on the document so that there are no surprises for anyone.

Check in Early & Often: This essentially means to communicate, communicate, and communicate. How to communicate could differ from client to client; the methods would ideally be worked out in the beginning.

Keep It Simple Silly: There is another saying that says something like “don’t boil the ocean…”: Deal with issues one step at a time so that they are manageable.

Just Because You Can, Doesn’t Mean You Should: Products and projects should have a purpose; don’t do them for the sake of doing them. Remembering that point helps with user adoption.

Finally, it is important to remember: change happens and change is good.

Planning and Using SharePoint Term Stores, Taxonomies, and Managed Metadata within the SharePoint Environment
Dan Hartshorn

Dan demonstrated how to create term sets within SharePoint’s term store manager and how term sets can improve navigation and search. He explained the difference between pinned and reused terms within the taxonomy. After creating a service connection to the managed metadata service (MMS), there are multiple options for managing the MMS either via the user interface (UI) aka web browser, or PowerShell, or programmatically by using Patterns & Practices to update the relevant taxonomy. Information on Patterns & Practices can be found from GitHub at https://github.com/OfficeDev/PnP.

Generally speaking, there are a few things to keep in mind when creating term sets using the term store management tool: (1) think about the content on your tenant (a/k/a site) and plan what taxonomy best reflects it; (2) then start off with creating the (core) groups; (3) create term sets, each with a globally unique identifier (GUID), from each group; (4) provide a description for each term in the term sets; and (5) augment each term within the sets with appropriate synonyms (a/k/a other labels).

Content Types in Thought and Action
Scott Shearer

Custom content types within SharePoint can be simply described as a template for content stored in a list or library. Remember: there are out-of-the-box (OOTB) content types; the cardinal rule is to never edit or delete an OOTB content type. Creating custom content types allows for a standard way to record a given type of data that can be reused across the site in multiple lists or libraries. When creating a custom content type that multiple lists and libraries will use, updates to that custom content type need only to be done once and it will be updated across the site. Creating custom content types can either be done in the UI or via SharePoint Designer. Scott demonstrated the use of custom content types with an example of a leave request calendar that also uses an associated workflow.

Step by Step to a Power BI Dashboard
Peter Serzo

I gained insight from all the sessions I attended on Saturday, but Peter’s session was truly one of my favorites. I learned some additional nuggets of information such as the usefulness of Power Query and Power Pivot within Excel and the flexibility of the next version Power BI which was only released on July 24. The steps in developing the dashboard start with the data, manipulating the data by creating a data model with Power Query, and then assembling the dashboard using Power BI.

Office 365 Blog 101: Produce and Share Personal Content – Social Knowledge Network Foundation
Nicolas Georgeault

Nicolas demonstrated the enhanced features of the Office 365 (O365) blog, which have been released to those that have activated the release of new updates under their O365 subscription. (For those with O365 subscriptions, you can reconfigure your Services Settings Updates in the Admin Center.) These new features leverage the social knowledge network using Delve and eventually Sway. Sway is a nifty way to create interactive presentations like a story—think Storify. The other nugget of information I learned from this session is a handy (and free) plug-in branded Mix for using in PowerPoint 2013 that enables you to create videos from your presentations. See www.mix.office.com/.

More Ways to Share

If you are interested in attending a SharePoint Saturday, check www.spsevents.org/. SharePoint Saturday events are often organized by the local SharePoint User Group. SharePoint User Groups are also another way to keep informed regularly since they meet monthly. You can usually find a user group near you through MeetUp (www.meetup.com). You will notice that the SharePoint community is a small world and you will bump into familiar faces at the Saturday conference or User Group meetings. My husband and I have been to many SharePoint Saturday events in Massachusetts, Rhode Island, New Hampshire, New York, and New Jersey; as well as the Boston Area SharePoint User Group (BASPUG) meetups. We are proud to call our SharePoint Community our friends.

Chrisy Geluk is the principal of Librarian At Your Service, LLC, based in Pinehurst, Massachusetts. Contact her at christine.geluk@live.com or http://geluk.us.
Attending the 2015 AIIP annual conference in Irvine, California and hearing best-selling author Samantha Bennett speak about being a creative entrepreneur changed my life. Yes, I know, a little over the top but… it is true.

Like many in the audience that day, I bought Sam's book *Get It Done: From Procrastination to Creative Genius in 15 Minutes a Day* and I stood in line to have her sign it. I read the book, visited Sam's business website, The Organized Artist Company, and promptly signed up for a free teleseminar entitled “How You Can Make $1,000 Any Time You Want Using Your Creativity.” Then, I made $1,000 in my business within two weeks by using Sam's methods and creatively working in my business as an independent information professional.

I was hooked. Sam talks about being creative in your business without losing your soul, your mind, or all your money. Her ideas are not new or unique but she speaks to that creative part that's often overlooked by the business, marketing, and self-help gurus today. I found her methods of jump-starting business ideas, finding and enrolling new clients, and dealing with life as a solo entrepreneur fit my work as an independent information professional.

When I heard that Sam's annual three-day conference, The Big Big Yes! was going to be in Los Angeles, California (practically my backyard), I immediately signed up. Little did I know I would be attending the conference as a sponsor and taking my business to a new level of profitability and creativity.

The Big Big Yes! was billed as "entrepreneurial summer camp for creatives. Part conference, part funhouse." Images of artists, writers, actors, and musicians creating business plans and marketing strategies with butcher paper and crayons filled my mind. I envisioned creative entrepreneurs sharing their unique products, services, and business ideas with like-minded people in a place where no one's dream would be too big. The Big Big Yes! was all of that and much more. There were colorful pipe cleaners and big bright markers to do crafty things with while listening to panelists talk about their business experiences, along with big hairy fears and the scary growing pains that come with new experiences.

As the conference title suggested, saying 'Yes!' was the rule for the three days. My first big yes came well before the event when I agreed to have my business, Digi Organizer, be a sponsor. Accepting the sponsorship pushed my business marketing and sales skills way beyond my comfort level. I was responsible for a table displaying a visual representation of my business; made myself available to conference attendees to discuss what Digi Organizer offers business owners; gave mini free consultations for people struggling with digital chaos in their business, plus I simply had to show up for myself and my business. The preparation for the event forced me to improve my elevator pitch, to create concise written materials explaining my services, and to clarify my business goals and vision. It was a daunting challenge that I am grateful I accepted.

I highly recommend being a sponsor at a business conference, networking event, or other function where potential clients may gather. The benefits can be tremendous—securing new clients (I gained six new clients at The Big, Big Yes!); selling your company's merchandise (how many of us bought Sam's book at the AIIP 2015 conference?); increasing your potential client list (I have three appointments set this month with potential clients from the Big Big Yes! plus I added 75 new names to my email list); test marketing new services and products; business exposure to a large number of people at one time; meeting other business owners/entrepreneurs and learning, learning, learning from the experience.
It has been nearly three months since the 2015 AIIP annual conference in Irvine, California, where Sam Bennett spoke to us. As you see, I’m still reaping the benefits from attending our annual meeting and serving as its local arrangements chairperson. I encourage everyone to get involved in next year’s AIIP conference—join the committee, be a presenter, or step up to a sponsorship. Use your creativity to stretch your comfort zone. See you at AIIP 2016 in Pittsburgh.

Patti Peregrine is the CEO and Founder of Digi Organizer, coaching and consulting for your creative digital life. She works with business owners and entrepreneurs (and creative types) to help save them time and money by strategically planning their web presence—from websites to e-commerce and everything in between. Contact her at 310-991-8140; psperegrine@gmail.com; or contact@digitorg.com.

A Big Data Guide for Librarians and Information Professionals

Amy Affelt shows information professionals how to leverage their skills and training to master emerging tools, create search deliverables, and discover new opportunities by embracing their inner data scientist. “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 master emerging tools, create search deliverables, and discover new opportunities by embracing their inner data scientist.

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Why Blogs?

I used blog posts as data sources for my research because blogs are primarily qualitative and narrative. Unlike survey data, blog data occurs in a natural or real-world setting, rather than being artificially contrived based on a researcher’s request for information. Blogs are further seen as media for presenting self and for capturing an ever-changing or ongoing present. Blogs provide insight into everyday life and are good for answering questions about people’s everyday lived experiences. (These points on the advantages of blogs as data sources are discussed in Hookway, N. (2008). Entering the blogosphere: Some strategies for using blogs in social research. Qualitative Research, 8(1), 91-113. doi: 10.1177/1468794107085298).

Bearing this in mind, blogs are perfectly suited data sources for analyzing the experiences and multiple voices or stories about library consulting. I collected and analysed blog data, comparing and contrasting them for new knowledge about various bloggers’ experiences of library consulting and of being a library consultant. What follows are five narratives that indicate some of the types of identities that are constructed of library consultants and the work of library consulting. Names have been modified to preserve identity and anonymity of those represented in the blogs.

There are numerous narratives that represent library consulting as making an important contribution to clients. Bloggers represent library consultants as being change agents or entrepreneurs taking their own destiny into their hands or as ushering innovations into libraries. Such narratives follow the pattern of fairytales, where libraries can be seen as damsels (or victims) of distress and library consultants as the handsome princes (or courageous princesses) that come in to save them.

Story 1: The library consultant as visionary

Sue P, a library consultant, is represented as a planner and visionary. In November 2010, a particular academic institution announces that Sue is about to help the library plan for its future by designing a new learning commons. As part of the process, Sue makes herself available to meet students and faculty of the academic institution to get their input regarding this new library space. The narrative further positions Sue as one of the main protagonists that will come up with the plan that the university’s president will support.

In this narrative we see the theme of the library consultant being one that ushers in a new age or imparts something new to the institution/library. The narrative echoes a hero theme, with Sue P being the hero and visionary that helps the institution or client to step into the future. In this regard, Sue P represents the library consultant identity as visionary and as a leader that helps the client to move from the past and present to a new desired future.
Story 2: The library consultant as a survivor in a dismal employment climate

Next we learn of two law librarians turned library consultants, whom I call Bonnie and Clyde. In November 2008, in a blog post for law librarians in Vancouver, Canada, a narrative is told of Bonnie and Clyde expanding the industry of law library consulting by adding their unique advisory services to make law libraries more cost efficient. The narrator is a Canadian information consultant, who introduces the entrepreneurs and their services, as well as their website and blog. The two entrepreneurial library consultants are reported to offer advice and training to make information services more cost effective, so that savings can be passed on to clients, associates can be retained, and costs be kept down.

In responding to the original post, a reader expressed pleasure at seeing these library consultants repurposing their degrees and entering into entrepreneurship. The commentator also admonished library school students to take note of this model.

Once again, this narrative raises a hero theme of the library consultant doing something new or out of the ordinary. Again, we see the theme of the library consultant offering to impart something new to the members of the library or, in this case, to law firms. These law library consultants propose to help the firm save money so that other jobs will not be lost and costs of legal services can be contained.

In the comment to this story, a new theme—of consultants taking charge of their destiny and doing something new or unintended with their degrees—emerges. The commentator to this blog post is “fascinated” and seemingly impressed at their entrepreneurship and also advises that library students should see their story as an object lesson of how to survive in an environment where there are few employment opportunities.

Story 3: Library consultant as informal mentor and trainer of novice librarians

Our third narrative comes from a blog post from Bibi, then an MLIS student, who sought to educate herself in marketing libraries. To do this, Bibi turns to the library and finds a book by a library consultant. In May 2010, Bibi blogs about this marketing book by a Swedish library consultant, Zu H. Bibi not only reviews the book and what she learned from it, but also says that she read the book because her library school curriculum did not adequately cover the concept of marketing; in contrast, Zu H offered an introduction to applying marketing concepts specifically to libraries. However, Bibi struggles with the fact that Zu H’s ideas were used by libraries in Sweden and is a bit concerned about the applicability of these ideas to small town public libraries in her area in Canada.

While this narrative is not focused on the library consultant, the theme of library consultant as an expert and knowledge broker for those in need of ideas and lived experience still emerges. In this case, the library consultant has codified the knowledge into book format, making it explicit and providing librarians with access to this knowledge and ideas from the experience of other libraries in a self-teaching format. As a result librarians—and in this case, the library student—can take charge of their own empowerment and acquire the new knowledge needed to transform how they work. However, acquiring the information from a book is limited; ideally, the seeker of information wants to talk with the consultant and have the consultant solve their problem by telling which ideas or experiences may be relevant for their specific geographic setting and context.

Story 4: The Library consultant as the purveyor of knowledge at library conferences

In our next narrative, Myra G, a customer experience consultant, is contacted to speak at a library conference. The experience of preparing and speaking at the conference transforms her into a library consultant. This transformation is documented in Myra G’s July 2013 blog post discussing and sharing six ideas to improve the customer experience in libraries. She begins by discussing her experience of delivering a keynote to two separate librarian events, which caused her to research libraries and what they do in three different cities in the U.S.. Myra G also shares feedback that she received from a librarian impressed with her talk.

The theme of the library consultant being one that imparts something new to the members of the librarian community is again prevalent in her narrative. The narrative also echoes previous hero-narratives, with Myra as the hero setting out to share her knowledge and empower librarians with solutions for dealing with the problem of providing a satisfying customer experience of the library and its services. In this regard, Myra documents some ideas and her experience interacting with librarians and libraries to assist librarians seeking answers to this problem.

Story 5: The library consultant as the developer of new libraries

In this last narrative, Lin M documents how she served as a library consultant in 2011 to a college seeking to meet national accreditation guidelines. In this experience of consulting, Lin outlines that her project was to provide consultation for the development of a new library to comply with accreditation guidelines of The National Association of Schools of Theatre.

Her narrative continues the hero theme as the school worked to comply with the standards of an external body. To achieve their goal, the library consultant offered them consultation to develop a new library. Consequently, we see the continuation of the perception that library consultants are very valuable as the heroes that permit the goals, dreams, visions, and aspirations of institutional actors to be attained.

Why Do These Narratives Matter?

These five narratives provide a view from blogs about potential value and contributions that library consultants have to offer. In general, the narratives provide, through social media data sources, an updated footnote to the professional literature about the evolution of library consultants and library consulting. Simultaneously, these narratives contribute perspective about what library consultants are up to or have been doing, as captured in the electronic trails of blogging platforms.

Mark-Shane Scale is a fourth-year doctoral candidate at the Faculty of Information and Media Studies at the University of Western Ontario, Canada. His dissertation is entitled Representations of Consultants and Consulting in Librarianship: A Narrative Analysis of Four Blogging Platforms. You can send comments or feedback to mscale@bell.net. Alternatively, you can reach out to him on LinkedIn or Twitter.
Get Ready for #AIIP16 in Pittsburgh, Pennsylvania

By Jocelyn Sheppard, Red House Consulting

Get ready to join your colleagues at the Omni William Penn Hotel in Pittsburgh on April 7–10, 2016 for the 30th annual AIIP conference, AIIP 2016: Partnering for Success. The elegant and historic William Penn (530 William Penn Place, Pittsburgh, PA 15301 USA) is centrally located in the compact downtown, with restaurants, parks, performing arts venues, and historic sites all within walking distance. The hotel recently completed a major renovation of its sleeping rooms, and in 2012 earned a fourth diamond from the AAA Travel Club.

Pittsburgh has some nice changes in store for AIIP members who haven’t visited the city since the annual conference was held there in 2008. If you’re planning to drive, you’ll be glad to know that the underground Mellon Square Parking Garage is located directly in front of the hotel, and offers reasonable weekday and weekend rates.

Getting Around

One of the biggest recent changes in Pittsburgh has been the proliferation of transportation options. Not only are there many more Yellow Cabs than there were back in 2008, but now Uber and Lyft are both operating in Pittsburgh (NOTE: not everyone is happy with Uber and Lyft being here, so be sure to check back on that closer to the conference).

A truly amazing change downtown has been the addition of protected bike lanes. Attendees may want to bring their own two-wheelers, or take advantage of the city’s new bike share program—and perhaps visit Bicycle Heaven, billed as the world’s largest bicycle museum and shop.

Walkers, runners, and strollers alike will enjoy the paved sidewalks along the Allegheny River, a 10-minute walk from the hotel.

Getting Fed:

Market Square
www.downtownpittsburgh.com/play/dine
Bruegger’s Bagels
https://www.brueggers.com/

Conference Hotel:
Omni William Penn Hotel
www.omnihotels.com/hotels/pittsburgh-william-penn

Getting There:
Southwest
www.southwest.com/
Amtrak
www.amtrak.com/
Greyhound
www.greyhound.com/
Megabus
us.megabus.com/
Horseshoe Curve
www.railroadcity.com/visit/world-famous-horseshoe-curve/
Mellon Square Parking Garage
www.pittsburghparking.com/mellon-square

Getting Around:
Yellow Cabs
www.pghtrans.com/yellow_cab.cfm
Uber
www.uber.com/cities/pittsburgh
Lyft
www.lyft.com/cities/pittsburgh
Bike Pittsburgh
www.bikepgh.org/
Bicycle Heaven
www.bicycleheaven.org/

Downtown Pittsburgh
**Getting Fed: (cont’d)**

**Starbucks**
www.starbucks.com/store-locator/search/location/Pittsburgh%2C%20PA%2C%20USA/detial/12266

**Thin Man Sandwich Shop**
www.thinmansandwichshop.com/

**Peace, Love & Little Donuts Shop**
www.peaceloveandlittledonuts.com/

**Strip District**
www.nextpittsburgh.com/neighborhoods/strip-district/our-guide-strip-district/

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**Getting Culture:**

**Fort Pitt Museum**
www.heinzhistorycenter.org/fort-pitt/

**Andy Warhol Museum**
www.warhol.org/

**Senator John Heinz History Center**
www.heinzhistorycenter.org/

**Society for Contemporary Craft**
www.contemporarycraft.org/

**Carnegie Museum of Art**
www.cmoa.org/

**Carnegie Museum of Natural History**
www.carnegiemnh.org/

**Dinosaur Collection**
www.carnegiemnh.org/exhibitions

**Hillman Hall of Minerals and Gems**
www.carnegiemnh.org/online/hillman/

**Phipps Conservatory and Botanical Garden**
www.phipps.conservatory.org/

**Dale Chihuly**
www.chihuly.com/

**Fallingwater**
www.fallingwater.org/

**Kentuck Knob**
www.kentuckknob.com/

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**Getting It All Together**

The 2016 Conference Committee is exploring options for dine-arounds with local members of the Special Libraries Association and the Society for Technical Communication, tickets to a Pittsburgh Pirates baseball game (if they’re in town) or a Pittsburgh Penguins ice hockey game (if they’re still in contention), theater and music offerings, dining promotions, and more.

We’ll use the AIIP conference webpages to share what we find, so be sure to check there as you start to make your Pittsburgh plans. In the meantime, please send any questions, comments, or suggestions to local arrangements coordinator Jocelyn Sheppard (jocelyn@redhouseconsulting.com).

**We’ll see you in Pittsburgh on April 7, 2016.**

Jocelyn Sheppard is the Principal Consultant at Red House Consulting, providing research, analysis and strategy for high-tech startups and nonprofits. She has been a member of AIIP since 2001.
For 20 years, I have had a client who contacts me about once a year for a proposal, but he has only given me a few projects. The reason for so few sales is that my getting his business depends on whether he gets his business. He owns a small ad agency. Ad agencies compete for accounts. They win some, they lose some. This client’s research projects are challenging but invariably interesting.

Several years ago, I went through an episode working with him that was a bit of a nightmare. There were more than 50 emails back and forth over four months. He asked question after question about aspects of the project—and this was after I had given him the budget, but before the sale was finalized. After the harrowing months of Q&A email I thought, “Wow, next time I’m going to add another $1,500 to the project to cover unanticipated time.” Compare this to my typical clients who explain needs and retain my services during the very first or second phone call or email discussion. In those cases I either ask the client to write out the request and authorize the project, or I email my understanding and include pricing, deliverable format, and terms. Voila! The sale is closed.

The next time with that long-term client came along recently. He sent me a folksy email asking for research and a quote for what looked like a fairly basic market category, but which turned out to have multiple segments. I replied with price, timeframe, and terms. He authorized the project, agreeing to payment of 50 percent in advance and 50 percent upon delivery. I began working in good faith before payment was received—something I rarely do and advise against, it is almost always best to wait until funds are in the bank. I went against my own recommendation. That said, there was no problem; a week later he paid the advance payment. Sounds good? Not.

The day he paid, he emailed additional questions that had not been part of the initial request or included in my budget proposal. Also, he asked for daily updates for a project that was to take no more than three weeks. I immediately decided that daily updates were out of the question, but responded with a status report, thinking it would suffice for the moment. I planned to explain later why daily updates were not wise and that they were not included in the project budget.

The next thing I knew, my client’s client wanted the project stopped, because of one comment in the update. My client was in a panic and very stressed. I explained that the information in the update was inconclusive. After a fairly tense phone call strategizing about how to handle his client, he was able to move forward and salvage the project.

My bad; because of my long-term relationship with this client, I had not included my usual scope creep paragraph. Nor did I address the issue of updates or include a kill fee clause.
My Philosophy About Updates

Providing updates while in the middle of research is not the way I normally work on shorter projects. Updates take extra time to provide and open up the possibility of scope creep. In an otherwise tight and cost-effective budget, there is no room for the additional work of creating and communicating updates. Moreover, it is not uncommon for clients to want more but not wish to pay for it. When this happens, it is necessary to take control and renegotiate the budget.

Updates should be discussed at the outset. An update can be general, indicating where you are in the project, rather than substantive. In this case, I unwittingly provided a comment that concerned the end-user client but omitted the whole picture, which I did not have at that time due to where I was in the research process.

Bottom line: be proactive. Ask clients whether they would like updates, and come to an agreement about frequency before you quote the project. Let them know that updates require extra time and costs. Decide whether updates are a brief status report about your progress in general or details with substantive content. If substantive, it will take more time and could negatively alarm the client unnecessarily. Estimate the time it will take to provide updates and include that time in the budget.

Kill Fees

Historically, I have not used a kill fee clause. More recently, I have on occasion. Without a kill fee, there is no protection if a client wants to stop the project before you have completed the research, as was the case with this recent project until I explained why using limited and inclusive information for an important business decision is a very bad idea.

Whether or not to include a kill fee clause is an individual business decision. When I include one, it states that all expenses are charged, as is time worked, based on my hourly fee. If a client decides to stop the project at any point, a researcher must be paid for work conducted. The client may want you to provide your work up until the stopping point. Depending on where you are in the project, you may wish to comply; however, if doing so would not be representative of the quality of your work, I advise against sending it. Raw data that has not been analyzed or files that have not been organized are apt to leave a very bad impression. If the client agrees to your spending time to wrap up the project and you can make the work reasonably presentable, it is fine to send it. A kill fee clause should spell out your policies.

In summary, all project specifications should be discussed and agreed upon by both parties before you write a proposal or prepare a letter of agreement or contract. Such documents should include protective clauses covering scope creep, updates, and kill fees. Being lax for even long-term clients can have negative effects, such as disagreements and stress—not fun. Taking precautions is an important client management procedure. Even so, there may be a need for changes. Include a statement reserving the right to request authorization for additional budget if changes are made before the project begins or during the project. Finally, it is not uncommon for new questions to arise based on the research findings. Make sure the client understands you charge for research required to answer these questions.

Amelia Kassel is President of MarketingBase, a global firm specializing in industry, company, and competitive and market intelligence research. Amelia operates The Mentor Program for new research professionals and those wishing to expand. Contact Amelia at amelia@marketingbase.com or www.marketingbase.com.