Get ready for a jam-packed June 2016 issue of AIIP Connections. This is the Conference Issue where we report exclusively on AIIP’s annual conference, held on April 7–10th, 2016 in Pittsburgh, PA, USA.

We hear from Jane Langeman in her first message to the membership as she starts her term as President of AIIP.

Myra T. Grenier award winner, Elizabeth Lamoreaux is in our Member Spotlight this issue, and she shares her experience as a first-timer at the conference.

Bruce Rosenstein gave the Roger Summit Award Lecture on the subject of creating a compelling future.

We also heard from Jeff Evans who talked about be a better consultant. Leona Mitchell from the University of Pittsburgh gave us ideas on how to improve our relationships with clients. Nicole Fende showed us how to conquer our fears of financial data and make them work for us.

We had several member presentations. Joann Wleklinksi and Marge King told us about the collaboration they have been working on, and provided tips on how to collaborate successfully. In a single hour, Mark Goldstein and Marydee Ojala powered through 60 excellent sites that every information professional will want to check out. And Jocelyn Sheppard experimented with an interactive session on partnerships that succeeded thanks to audience participation.

Look for short reports on the ever-popular Tips Tables—hot tips in 20 minutes. First-Timer and Not-First-Timer sessions gave members the opportunity to warm up for Friday morning introductions. And we have a special report on this year’s conference give-back initiative that benefited the Center of Life Jazz Orchestra.

Thanks to our team of conference reporters, nearly 20 members, who volunteered their time and talent to bringing you a snapshot of the conference in this issue. Speaking of snapshots, all of the conference photo credits belong to AIIPer Mark Goldstein who seemed to be everywhere with his camera throughout the event. Thanks Mark!

Enjoy the issue, but don’t miss the back page so you can mark your calendar now for AIIP 2017.

Phyllis Smith
Editor, AIIP Connections
ConnectionsEditor@aiip.org
Halton Hills, Ontario, Canada
A Year in Reverse

When I look back at the end of my term as AIIP President in 2017, the end I want to see is one in which people seek out AIIP and its members as consultants, partners, colleagues, followers, and fans because of the exceptional value and leadership we provide as independent information professionals (IIPs).

As AIIP members we’re part of an international ecosystem of independent information consultants with expertise across industries, services and geographies. Many are expert researchers providing leading-edge access to, and analysis and reporting of, complex issues and topics. Others are technologists, management consultants, private investigators and marketers, to name a few of our specialties. We form a diverse community of IIPs with some key shared traits: we’re independent of sponsorship and flexible in our abilities to react to client needs, and we can scale our services by tapping our community of expert IIP peers.

Our members typically belong to other associations that serve their technical or subject matter needs. They join AIIP for advanced research strategies and resources, small business training and professional networking opportunities for solopreneurs. Because we’re not all the same, we benefit from cross pollination of knowledge and experience across communities like patent researchers (PIUG), technical writers (STC), librarians (SLA), competitive intelligence analysts (SCIP) and prospect researchers (APRA). We learn a lot from each other!

As I started my own business after leaving the corporate world, I realized I was losing my support network. I needed to become more self-reliant and develop a new network of people facing similar challenges. I looked for a community of people that I could grow my skills and business with. In AIIP, I found a group of smart, connected, and innovative solopreneurs actively growing their independent businesses. What surprised and pleased me most was the diversity of our information-centric practices.

I love that I know nothing about some of these practice areas like patent research or private investigations but I can always learn from the way people approach problems, their clients and skill sets. I love that I’m challenged with how much I don’t know. I value that a lot, that we’re not all the same. In AIIP, I found a community of like-minded “solopreneurs” and have enjoyed growing my business with them.

We just wrapped up our annual conference, “Partnering for Success,” in Pittsburgh, PA. Our programming was expansive and targeted, interactive and engaging. The only time I picked up my Kindle was on the plane to and from Pittsburgh; the rest of the time I was meeting people, learning from experts, and exploring the area. One of the values we wanted our members to get from the conference was to step into their discomfort and implement proven or emerging business practices that may be new to them. At the conference we had ample opportunities to build relationships with colleagues and our valued industry partners.

Our recent membership survey confirmed the value of leveraging our relationships with each other by partnering on projects. IIPs who partner win larger projects than what they could accomplish alone. Partnering with colleagues allows solopreneurs to grow their skills and have an entrée into new client communities. For those starting out, partnering with peers allows them to build an IIP track record. For others, partnering may mean productizing a service with a colleague. We may be solopreneurs, but we are anything but alone on our journeys.

Our indomitable conference chair, Peggy Garvin, and her team created a truly wonderful conference. How could we top #AIIP16 in Pittsburgh? Our energized members immediately started offering ideas parlaying what they learned to our 2017 conference in New Orleans, LA. Never been there? Get to know AIIP and its members now, and join us for a great conference in New Orleans on May 18-21, 2017. We hope to see you there!

Jane Langeman
Need Primary Research?

Sometimes secondary research alone isn’t enough to answer your clients’ questions. If you need primary research, work with a fellow AIIP member!

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COMMITTEE SPOTLIGHT:
PARTNERING FOR THE SUCCESS OF AIIP 2016

By Peggy Garvin

You may have observed more than a little skepticism out there about the value of conference themes. The themes are overly vague, and they never relate to the program anyway, right? I rarely pay attention to a conference’s theme, so I will admit I was a bit skeptical myself; even more so after looking at a few of the “Name Your Conference” websites suggesting fairly awful-sounding conference theme ideas, like “Great Expectations,” “Keep ’em Rollin’,” or “The Pride and the Promise.” Along with those gems, the sites offer some plain vanilla themes that seemingly must contain at least two of these words: future, vision, excellence, or change.

But we went ahead with a theme, “Partnering for Success,” and it worked! (Thank you, Jane Langeman.) Looking back, I can see that it was a fitting motto for both the content of the conference and the team effort put forth to stage it. Volunteer reporters have the conference content covered in this issue of AIIP Connections; as for the team effort, it was remarkable.

The 2016 Conference Planning Committee had a dozen core members, three others who assisted with specific tasks, and our honorary member Matthew McDaniel of the AIIP Office. When I add in all of the AIIP members who provided assistance and sponsorships, the rough total is well over fifty.

That is fifty-plus volunteers doing web and social media, proofreading, advising, serving as moderators, sponsoring items, contributing raffle prizes, bringing props and lighting for the photo booth, stuffing conference bags, and helping in so many other ways. We are all independent information professionals who run our own businesses, often working from a home office; many of us don’t even see fifty people in a week, much less work with them to pull off a stellar conference!

AIIP 2017 will be in New Orleans, Louisiana, on May 18-21. If you’d like to be a part of it, save the date and consider volunteering for the Conference Planning Committee or any other AIIP activity. The volunteer form is online at: http://aiip.org/Volunteer-Form.

See you in New Orleans!

Peggy Garvin
AIIP 2016 Conference Coordinator

Thank You AIIP 2016 Conference Volunteers

Mary Ellen Bates
Jean Bedord
Judith Binder
Heather Carine
Cathy Chiba
Marjan Farahbaksh
Peggy Garvin
Mark Goldstein
Lauren Hayward
Anne Hengehold
Liz Lamoreaux
Marydee Ojala
Kathy Porter
Jocelyn Sheppard
Ulla de Stricker
Ed Vawter
On April 9, AIIP conference attendees enjoyed a live performance by Center of Life (COL) Jazz Program Coordinator Mark Jackovic and the COL jazz ensemble. Performers consisted of kids, juniors, and adults, and instrumentation included keyboard, drums, saxes and brass as well as vocals. All played enthusiastically and with concentration and talent—as can be seen and heard in the video of the performance posted on the AIIP YouTube channel. The tunes were mainly jazz standards and blues, each played with statement and improvisation.

After the performance, conference attendees met and mingled with the musicians, sharing stories of how listening to and performing music had made a difference in their lives. As a thank you to its AIIP supporters, COL Jazz distributed copies of several of its recordings.

Inspired by Roger Summit’s $500 challenge grant, AIIP members donated just over $2,000 to the COL Jazz Program. The funds will be used to substantially extend the group’s music library and scholarship fund, beginning this summer when COL will hold its annual jazz camp for youth of all ages and experience levels. Throughout the summer, these youth musicians will provide free concerts in the local community, providing live performance experience for the students and accessible cultural enrichment for the community.

More information about the COL Jazz Program is available at http://centeroflife.net/col-jazz/.

This is the fifth year that AIIP has hosted a Give-Back Initiative for an organization in the conference host city. Previous beneficiaries have included literacy, workforce re-entry, and domestic violence services agencies.
The AIIP Annual Conference has so many moving parts. It requires diligent eye for detail and well honed leadership abilities. AIIP’s diverse mix of information professionals have exacting expectations. Every year, for many of us, our conference is the highlight of the entire year.

This year’s conference truly upheld AIIP standards. At the center of it all was Peggy Garvin. With her leadership the team presented a stellar conference that received rave reviews:

"...discussions and presentations connected for me and led to some significant "aha" moments"

"Customer service, food, and setting was top notch."

"LOVE the Dine-Arounds"

"This year’s program was a great mix of presenters and topics."

It was an honor for me to lead the conference planning for AIIP 2016 in Pittsburgh, where I grew up. I know the conference schedule does not give us enough time to be tourists, but I hope everyone has a chance to go back—preferably in the summer—to explore beyond downtown.

I have volunteered to work on two other AIIP conferences in the past, one in Pittsburgh in 2008 and another in Baltimore in 2014. Before that, I took on program planning and leadership roles for SLA and several local groups, and helped as staff for the conferences hosted by past employers. What was special about coordinating the AIIP conference is that it requires bringing all of the pieces of a conference, from start to end, together into one cohesive experience for your audience. It is a bit like staging a major performance.

The experience made it clear to me that AIIP is what individual members, working together, make it. There is no "they" to innovate and get things done. It takes you. I was fortunate to have a great team that came up with creative solutions and carried them out, and I am truly grateful to each and every one of them.

Peggy Garvin, Garvin Consulting
2016 AIIP Conference Coordinator

Peggy has been a star in her role as Conference Chair. I admired Peggy’s leadership of the conference team scattered around the world. She is calm, forward thinking, across the detail, happy to delegate and very appreciative. The proof of her skills is in the wonderful Pittsburgh conference and the legacy she is leaving to run a great conference in New Orleans in 2017.

Heather Carine
Workshops Co-ordinator
AIIP Pittsburgh 2016

How lucky are we to have had a leader like Peggy Garvin for our 2016 conference? She preserved what was best of our conference traditions while shaking things up in ways that tickled. Peggy is a first rate project manager and an even more valuable AIIP leader.

Jane Langeman
AIIP President
Langeman Consulting

"If you've worked on a conference planning team, you know what a herculean job it is. If you haven't, a) you should, and b) hope like heck for a leader like Peggy Garvin. Peggy led the team with grace, patience and professionalism, and the results demonstrate her effectiveness. 5 stars for Garvin!"

Anne Hengehold
Claiify Info
Sue Rugge Award
Jan Sykes, Information Management Services, Inc.
Jan was the recipient of this prestigious award through her formal mentoring excellence and generosity. The Sue Rugge Award consists of a $500 cash stipend awarded to a full member of AIIP who has significantly helped another member or members through formal or informal mentoring.

Myra T Grenier Award
Elizabeth Lamoreaux, Trendcasting™ Market Strategy
Liz received the $600 stipend associated with this award. The Myra T. Grenier Award is given to a new AIIP member who has never attended an AIIP annual conference.

Connections Writer’s Award
Cathy Chiba, Dauratus Research, Inc.
Cathy received the $350 award for writing the best original article published in AIIP Connections in 2015: “Overcoming Stage Fright: Lessons from Centre Stage,” in the Dec 2015 issue. The Connections Writer’s Award is sponsored by Information Today.

Marilyn Levine President’s Award
John Bryans, Editor Extraordinaire
John has been a key contributor and happy face at AIIP annual conferences for over 20 years. Information Today is a long-term AIIP Industry Partner. In recognition of John’s extraordinary contributions to AIIP and its members, and in anticipation of his participation as a member, AIIP President-Elect Scott Attenborough sponsored John’s membership in AIIP. The Marilyn Levine President’s Award is given in recognition of the person or institution which has demonstrated extraordinary support of the objectives of AIIP.

Pam Wegmann International Award, 2015
Judith Koren, ResearchWise Associates
Judy received the Pam Wegmann award in 2015, but was presented with it at AIIP’s 2016 Conference in Pittsburgh. The Pam Wegmann Award recognizes the contributions made by an AIIP member who lives outside of North America.
My First AIIP Conference: So Many “Aha!” Moments

By Elizabeth Lamoreaux, Trendcasting Market Strategy

I am a mid-life career changer who left a 20-year career to focus on my values, priorities, the legacy I want to leave, what has brought success into my life, and the fears I have to move through. I knew the conference would be valuable, but my business was not yet financially sound enough to support a trip to Pittsburgh. I contacted Ellen Naylor, who referred me to the Myra T. Grenier Award information on the AIIP website. I submitted my proposal to the awards committee and I am ever so grateful that I did because I spent the weekend engaged in so many interesting and meaningful conversations.

Being a first-timer, I traveled by myself and I did not know many people. Those I met were friendly, inclusive, fun, and interesting. To my surprise and delight, and thanks to the great conference planning committee, I attended a baseball game the first night I arrived!

The mentoring and relationship building throughout the conference made me feel very comfortable. I could focus on learning because I knew I was in a supportive environment. I have attended many conferences and can say that this one is truly exceptional. So many of the AIIP professionals are published writers, speakers, and leaders. And yet they are all approachable and authentic people who really care.

I had a variety of “Aha!” moments throughout the conference, but several stood out:

Mary Ellen Bates and Cindy Shamel led an interactive workshop for new conference attendees. The games, activities, and snacks helped us get to know one another. Then, we were given the assignment to speak in front of the room and introduce ourselves and our business after having ample time to prepare and practice. It didn't feel threatening because we were all in the same boat and had already laughed and talked together.

This leads me to another point: I ended up speaking three times in front of an even larger AIIP audience! It may have only been a question or brief statement, but I did it and wanted to. Soon after I returned home from the AIIP conference, I went to a packed professional meeting. I instinctively raised my hand in response to a call for volunteers. I got up in front of a room of professionals who were strangers and smiled. It felt so much easier to talk about my business after I had practiced in a safe place.

I learned so much over the course of a few days at AIIP. Ulla de Stricker and Cindy Shamel shared their best tools and resources in their pre-conference workshop on landing a new project. Leona Mitchell’s session on the mistakes consultants should avoid stands out in my mind. Marydee Ojala and Mark Goldstein shared a long list of resources of value to any information professional. Other great sessions covered the win/loss analysis, the five-p’s of success, creating smart questions, tips on primary research, and presenting webinars.

Finally, I met authors whose books I had read and re-read and never thought I would meet them! I listened to speakers who have original ideas. I learned from these mentors in person and even had the opportunity to share a meal with them.

I have to agree with Roberto Torres, the 2015 Myra T. Grenier Award winner, who said that the conference had “…plenty of role models…incredible tips and resources…plus camaraderie of new partnerships…”

Elizabeth Lamoreaux's business is Trendcasting™ Market Strategy. Elizabeth specializes in market research and implementation for businesses experiencing fast growth or change management. Learn more about her at www.TrendcastingMarkets.com or contact her at admin@trendcastingmarkets.com.
Build your Local AIIP or Special Interest Group

Reported by Mary Ellen Bates, Reluctant-Entrepreneur.com

The last session of AIIP’s Annual Conference, led by Ellen Naylor, focused on how AIIP can support local meetings of AIIP members—as well as virtual meetings for special-interest groups, first-year members and other focused groups. Ellen led attendees in a lively discussion of what works, what doesn’t, and what next.

Among the insights shared:

Consider the logistics for starting and maintaining a local infopreneur group. Reach out to members with a date, time and location of the first meeting—along with a discussion topic or agenda. Most meetings last two hours if in a face-to-face format, or one hour for virtual meetings. Consistency is important; most local groups meet quarterly.

Successful meetings are all about the content. If you can’t give people a reason to come, they won’t. If you do give them compelling content, they will drive an hour or two to attend. Stick with an agenda so that the meeting gets beyond social chitchat and stays focused on topics of interest to independent information professionals. Some groups have brought in vendor representatives of interest to members; all groups focus on the message that they offer “sharing, caring, and the chance to talk about the issues we all face.”

If you are interested in starting or joining a local or special-interest group (SIG), contact Jan Knight, Director Member Services (jan@bancroftinfo.com), for guidance and next steps. You can find an article on local and SIG meetings by Ellen Naylor and Heather Carine in the March 2015 issue of AIIP Connections.

STRENGTH IN NUMBERS

Presented by Nicole Fende, The Numbers Whisperer
Reported by Jan Knight, Bancroft Information Services, LLC

AIIP Members Don’t Let Other AIIP Members Drive Blind!

Agh! I’m one of those “not-a-numbers” people and I’ve learned I’m not alone. Nonetheless, Nicole Fende, the Numbers Whisperer, made her session engaging, fun, entertaining and educational even for me! Her metaphor of us Driving Blind (as in a car) fed the presentation so that we could all immediately recognize the dangers of just not knowing how we stand in our business finances, how we got there, and where we’re going. Out of many takeaway tips, I’m including a couple that might help YOU drive with your eyes fully open!

Among the insights shared:

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TIP 1: Take 15 minutes to regularly review “The Three Numbers You Need to Know” and you’ll be better equipped for success. Revenue (R), Expenses (E), and Profit (P). Remember: $100,000 ÷ 40 (hours per wk) ÷ 50 (wks per yr) ÷ 0.5 (or 50%). The bottom line $100/hour is the minimum hourly rate to pay yourself.

TIP 2: Determine your Minimum Hourly Rate to Pay Yourself. This tip has a twist from the standard equation of: (1) Identify what gross income you want to make. (2) Divide it by the number of hours you want to work in a year. The unique part of her equation is what she refers to as the Productivity Ratio or Efficiency Ratio. This is what many of us call Billable Hours – those hours spent generating money on actual work you can bill TO the client. (i.e. does NOT include marketing, administrative functions, etc.) Using an easy and not unusual estimate of 50% the equation would look like this:

$100,000 ÷ 40 (hours per wk) ÷ 50 (wks per yr) ÷ 0.5 (or 50%). The bottom line $100/hour is the minimum hourly rate to pay yourself.

She also suggested some time-keeping tools, ways to talk to clients about pricing, how to determine that pricing and much more. I’m off to try the formula with the same gross income but working 30 hours a week and taking 6 weeks off for vacation with a 65% productivity ratio. Wish me luck!

Look for Nicole’s slides and handout on the AIIP website.
There were two wonderful poster sessions on display in the exhibit hall at this year’s AIIP Conference in Pittsburgh that featured unique and entertaining experiences for conference goers.

Mary Ellen Bates displayed key takeaways from her recent survey, the 2016 Info-Entrepreneur Market Report: Insights on Information Businesses, which summarized the revenue, profit and characteristics of info-entrepreneur businesses. She accompanied her poster session with an Info-Entrepreneur survival pack and free 15-minute coaching sessions throughout the conference.

Valeria Hunter’s session, called “What’s Your Entrepreneurial Personality?,” sought to show how independent information professional entrepreneurs might partner for success based on their personality types. Valeria’s poster displayed four personality types, each represented by a different color smiley face that participants were able to put on their badges in order to look for possible collaborators. In addition, Valeria provided handouts that detailed typical characteristics of each personality type as well as their negative pitfalls.

Poster Sessions
Reported by Jennifer Wegman, Insight Information Solutions, LLC

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Bruce Rosenstein discovered Peter Drucker while in library management class and has studied his work for 30 years. He met him several times before Peter’s death in 2005.

In his lecture, Bruce covered five factors of the future:

- **Mindset** – Forward thinker
- **Leadership** – In all areas of life
- **Identity** – Professional identity and identity in the wide sense
- **Collaboration** – Working with others
- **Growth** – Organizational and personal growth

### Mindset

“*The purpose of work on making the future is not to decide what should be done tomorrow, but what should be done today to have a tomorrow.*” Peter Drucker

Your goal in work is to be inspirational more than informational. Peter believed the best way to approach the future is to keep it in mind as you go about daily life and work.

Each year Peter Drucker took time out to assess what he thought happened during the past year versus what actually happened, and to learn from this. Peter Drucker did this until he was in his 90s.

Bruce recommends that you keep a “Create Your Future” notebook.

### Leadership

“There is no such thing as a free lunch. There is no such thing as a free lunch.” Peter Drucker

Bruce thinks of Roger Summit’s vision for founding Dialog in the above statement.

He identified other visions of leadership:

- “To serve is to live.” Frances Hesselbein
- “Lost and found in a brave new world.” Margaret J. Wheatley
- “Leading in long time frames.” Daniel Goleman

### Identity

The following questions help to define one’s identity: Who are you? What do you do? What do you stand for? Where are you going?

In this vein, for info pros, consider the following:

- Serendipity and aha moments
- The power of questions (and listening)
- Packaging and selling relevance
- Curation of data, information and knowledge
- Servant leadership: the power of service
- The power of introverts and quiet

### Collaboration

We see collaboration in so many ways in what Bruce terms “new economies,” including these:

- Attention economy
- Creative economy
- Eviction economy
- Gift economy
- Gig economy
- Grandparent economy
- Green collar economy
- Harry Potter economy
- Hipster economy
- Insight economy
- Knowledge economy
- Misfit economy
- Peer-to-peer economy

### Growth

“The vision of where or who you want to be is the greatest asset you have.” Paul Arden, *It’s Not How Good You Are: It’s How Good You Want to Be*. Attention, mindfulness and inner strength tools are ways you can shift your own attention to stay focused on your business.

Bruce recommends these two books to stimulate mindfulness:

- *Flow: The Psychology of Optimal Experience* by Mihaly Csikszentmihalyi
- *Mindset: The New Psychology of Success* by Carol Dweck

- Carol’s message is to have a growth mindset instead of a fixed mindset.

Bruce Rosenstein is the author of:

- *Create Your Future the Peter Drucker Way: Developing and Applying a Forward Focused Mindset*
- *Living in More Than One World: How Peter Drucker’s Wisdom Can Inspire and Transform Your Life*
The Five P’s to Success: Planning, Partnering, Personality, Parties and Perseverance were my Keys to Success in 6 Months

Presented by Lynn Strand, Outside Knowledge, LLC
Reported by Maureen Shields, 42nd Street Group Inc.

Lynn Strand is well positioned to share with fellow independent information pros personal tips on business success. The past year has been a great year for Outside Knowledge LLC and Lynn attributes much of this good fortune to 5 P’s: Planning, Partnering, Personality, Parties and Perseverance. Although each “P” is quite self-explanatory and as Lynn stressed, “not rocket science,” her sharp insights and personal anecdotes made for a lively and informative discussion. From ensuring you have the structure in place for going independent to making a commitment to socialize and network in a fashion that works for you, participants left with a list of positively presented tips and approaches for finding new clients, securing speaking engagements and growing a successful business.

Be the Change You Want to See at AIIP

Presented by Jane Langeman, incoming AIIP President
Reported by Debbie Wynot, Insight Matters

In her Tips session for AIIP’s 30th annual conference, Jane Langeman threw open the floor for 15 minutes of exchanges with members on the topics of recruiting, industry partners, AIIP brand awareness and professional development.

The member feedback from her three sessions included:

• Recruiting independent information professionals from diverse sources by exhibiting at entrepreneurial conferences, creating talking points to use when speaking to student groups and widening new member recruiting to those transitioning from employees into information business owners.
• Expanding industry partnerships to further differentiate the value of membership in our association by seeking start-up vendors and exploring access to paid databases through licensing agreements with a major library.
• Widening AIIP brand awareness to attract independent info pros, clients and partners through AIIP member-team attendance at industry events and by offering a method to allow members to have virtual storefronts.
• Deepening our professional development for both established and new independent info pros through “re-mentoring” members who are changing business focus, fostering topical discussions amongst members and working with student members to help them gain experience.

If you have more ideas to add, please pass them along to Jane at jane@langemanconsulting.com.

Get Your Head Out of the Clouds, Put Your Business in the Cloud Instead: Top Tech + Tools for Solopreneur Business Success

Presented by Jennifer Burke, IntelliCraft Research, LLC
Reported by Maureen Shields, 42nd Street Group Inc.

In an incredibly informative 20 minutes, Jennifer Burke held eight AllPers captive with a rapid-fire presentation on some of the best cloud-based business tools (free and fee) to increase productivity and make our work easier. For ease of reference, tools were referenced in four categories:

• Money: accounting and invoicing tools such as FreshBooks and PayPal Invoices
• Productivity: time tracking and project management finds such as
Toggle and RescueTime

- Client: scheduling and CRM tools including Trello and YouCanBook.Me
- Miscellaneous: from mind mapping with XMind to beautiful graphics with Canva

This is simply a snapshot of an incredible list. Jennifer also provided all Tips attendees an evolving “big google spreadsheet” of many more Cloud-based business tools.

How to Manage Your Time When You Cannot Work a Typical 9-to-5 Day

Presenter: Beth Plutchak, Beth Plutchak Consulting LLC
Reporter: Roger Magnus, Roger Magnus Research

In addition to being a researcher, Beth also writes creative non-fiction. She asked other writers who typically have a non-traditional schedule to advise how they manage their time. The major takeaway is that one should make detailed lists, track time religiously, and control it, so one’s life’s priorities have appropriate amounts of time spent on them. She described several books listed for attendees in a resources handout (below a couple of these are mentioned):

- *Smarter Faster Better* by Charles Duhigg – Prioritize large goals and build in breaks to achieve them

Primary Research Interviewing Tips and Techniques

Presenter: Judith Binder, RBSC Corp
Reporter: Roger Magnus, Roger Magnus Research

Judith explained that primary research gets at the vast reservoir of information not available in secondary sources. To illustrate her point, she used a case study about the non-residential plumbing market in the United States.

There were several key takeaways:

- Primary research starts with a positive attitude.
- Preparation is key: think through what data you need; learn industry jargon; develop a collection plan; and produce an interview guide.
- Sequence matters: conduct less important interviews first; ask broad questions first, followed by more specific, conclude with general questions.
- Use elicitation techniques (source: *Confidential*, by John Nolan).
- Always ask for referrals.

Redefining Retirement

Presented by Susanne Bjørner, bjorner@earthlink.net
Reported by Phyllis Smith, ITK Vector Inc.

Susanne is a longtime member of AIIP and has been moving gradually towards retirement. She had surveyed AIIP members through AIIP-L to gauge member thoughts regarding retirement. She found that:

- 40% of respondents have reached full retirement age.
- Only 5% of respondents consider themselves fully retired, while 68% have not yet retired.
- 26% of respondents consider themselves to be semi-retired.

Most respondents will probably not sell their business or transfer their clients when they eventually retire. More than a third plan to maintain their business on a smaller scale in semi-retirement.

Susanne shared a few resources with us, including a *Wall Street Journal* report on retirement.

Security, Encryption, Passwords, Backup, Devices and the Cloud

Presented by Tom Wolff, Wolff Information Consulting, LLC
Reported by Becky Leung, BlueNote Research Group, LLC

Tom Wolff is the founder of Wolff Information Consulting, LLC. Tom specializes in patent information research which often encompasses sensitive and confidential information provided by clients. He provided a handout with helpful information regarding protecting the data stored on our electronic devices and in the Cloud. During the discussion, Tom highlighted the following tips for securing data:

- Protect business and personal information on devices and on the web.
- Secure all devices.
- Secure data on the Cloud.
- Use Password Manager software.
- Create file backup and recovery systems and include procedure documents.

Look for Tom’s slides with additional resources on AIIP’s website.
Solopreneur Webinars for Pay and Play

Presented by Matthew Von Hendy, Green Heron Information Services
Reported by Barbara Ingrassia, Manage Copyright

We assume that we should be presenting webinars, but Matthew asked us to consider: Why do we want to present a webinar and does the webinar format actually meet the needs, learning styles, schedules or budgets of our client base? He recommends the following:

- Make it easy to register, pay, and access the live webinar and recordings.
- Consider the size of the audience, ease of use, recording and distribution as well as cost when choosing the platform/software.
- Comply with ecommerce regulations.
- Avoid blatant self-promotion; ask friends to promote your session, and thank them.
- Plan for the unexpected; Matthew shared how he averted disaster just before he was to go live with his first webinar.

Flawless Consulting

Presented by Jeff Evans, Designed Learning
Reported by Scott Attenborough, Content Capital LLC

We are information professionals, and our businesses are consultative. By approaching our businesses as consultants, we increase the value of our contribution, the likelihood of success, and the prospect of repeat business. Consultants can be an integral part of the solution rather than piecemeal contributors.

The consultant can use the Flawless Consulting methodology to ensure both the consultant and the client get the most out of the business relationship.

It begins with clarity between the client and consultant. Through each phase of the consulting agreement, it is essential to use specific and targeted language. Specific language tends to increase understanding and thus satisfaction.

We all use language differently. We can be tempted to lean toward ambiguity to come to consensus, but the opposite is actually more productive. Using specific language will tend to rid the engagement of ambiguity and vagueness. By being specific, both parties will have a much better vision of what success will look like.

We must understand what the client wants, but, as consultants, we must also be very clear about what we want. The consultant must ensure the client understands those wants.

“I want …”

The key is to be very specific and treat all negotiations with respect by being direct, authentic, and compassionate.


You can also get a copy of the book Flawless Consulting by Peter Block.
In this session, Marge King and Joann Wleklinski both shared how AIIP networking and collaboration can result in a successful product.

Marge King is experienced in providing prospect research for nonprofit institutions. Joann Wleklinski provides editorial and research services for publishers, researchers and nonprofit organizations. Joann is the former editor-in-chief of AIIP Connections.

Marge and Joann connected during an AIIP conference. With their experience in working with nonprofits, they realized in their discussion that the same questions were asked again and again by these organizations. They recognized an opportunity to offer a product on prospect research to answer those questions.

Building on each other’s strengths and skills, Marge and Joann continued their dialogue after the conference. They did extensive marketing research and planning prior to launching Prospect Research Review, which is a subscription-based newsletter that reviews and highlights the products prospect researchers use to provide information to their clients. Soon after the launch of their first newsletter, they found that there was a demand from their target audience for more product reviews. In their first year of publication, they were successful in growing their readership, and they made a profit.

Marge and Joann walked us through the details of their collaboration; their presentation slides are available on AIIP’s website.

The key points made by Marge and Joann:
• Networking works
• Recognize the opportunity for a product or service

Lessons learned include:
• Know your strengths and skills
• Take the time to plan
• Understand your own and your collaborator’s work styles
• “Be open, be patient and embrace diversity!”

Yes, Mark and Marydee really did cover 63 websites in just a little over 60 minutes. With a quick and free flowing back-and-forth banter, they covered the purpose, scope, and the pros and cons of each site. They grouped the websites by category, noting costs, redundancy, content, ethics, and other tips.

It was the first time I’d heard of dark web pirate research paper websites like Sci-Hub that has tens of millions of illegally-obtained research papers. Mark and Marydee discussed the ethical considerations of using a pirate site. Mark said that he uses sites like this to find out what is available and then uses the legitimate databases to obtain the documents.

We learned the history behind Northern Light’s Millie search engine, including the fact that Millie is now free but doesn’t cover all industries—for that you need the paid service. Wolfram Alpha, a computational knowledge engine, has a sense of humor. When asked the meaning of life, it will answer, “42.” The resources on the list were not all related to information businesses. The final website covered was T-Shirt Hell: where all bad shirts go.

The other 59 websites were described quickly in a similar manner. This session was well worth attending in order to understand the key points and issues of the websites, which Mark has made available on AIIP-L and the AIIP website.
Five Common Mistakes Every Consultant Makes

Presented by Leona Mitchell, University of Pittsburgh School of Information Sciences
Reported by Judith Binder, RBSC Corp.

Leona Mitchell is a Visiting Professor of Practice at the University of Pittsburgh School of Information Sciences where she applies 30+ years of business, entrepreneurial, technical, sales, and leadership expertise. She spoke about bringing immediate value to the client engagement model and avoiding the five most common mistakes consultants make.

She introduced a value wheel to illustrate areas of focus to improve client engagement:

**Value:**
- Strengthen the value proposition by talking benefits and outcomes.
- Express value as bottom line, annualized savings, impact, ROI, results, failure.

**Problem:**
- Win business by defining the client’s problem through a needs analysis and framing the problem.

- Use factors described by the client as problems, indicators, or symptoms of the problem.
- Beware of client roadblocks: ignorance of the problem, fear of revealing too much, reluctance regarding costs, testing you.
- Ask many questions, test assumptions, keep an open mind, and help the client open up.

**True Buyer:**
- Identify the economic buyer. A non-buyer can always say ‘no’; he can never say ‘yes’.
- This can be challenging in a heavily-matrixed organization.

**Scope Creep:**
- Manage client expectations about the scope of the work because every added request cuts into profits.
- Balance building a client relationship with giving away portions of what could be Phase 2.

**Partnership:**
- Treat the client as a partner, with each of you holding separate and joint accountabilities.

Consulting is both “art and science.” The ability to successfully navigate the “art” is what sets apart the most successful consultants.

**Sources:**
- Flawless Consulting, by Peter Block
- The Practice of Professional Consulting, by Edward G. Verlander
- The Consulting Bible, by Alan Weiss
Partnerships: 5-Minute Real-Life Stories from AllP Members

Presented by Jocelyn Sheppard, Red House Consulting
Reported by Tracy Z. Maleeff, Sherpa Intelligence LLC

The inaugural session of “Partnerships” debuted at the annual conference in Pittsburgh. This freestyle format required neither prepared presentations nor Power Point slides—just a microphone, a voice, and a story to tell about how a partnership effected the speaker’s professional life. Seven volunteers emerged from the crowd and mostly stuck to the 5-minute limit of storytelling. With no limits as to what the participants could share regarding partnerships, there was great variety in the stories told.

Loretta Shaw kept session attendees in suspense as she recounted a time from her days at NASA when an important project came down to the wire. She spoke of collaboration, work ethic, and women taking charge of a mishandled situation in a male-dominated industry and work environment. Connie Crosby told how the AllP membership was her partner when she defended herself against false accusations of intellectual property theft. Cathy Chiba held the crowd’s attention with a tale set at a networking event—and how her inner voice was her partner guiding her to navigate a socially awkward situation. Other presenters included Arthur Weiss, Ruth Balkin, Roger Summit, and Josh Duberman.

This “un-conference” session format is a unique way to hear members’ voices and stories told in their own words. It’s an effective way to make direct contact and share real life examples from the trenches of being independent information professionals.
31st Annual AIIP Conference  
May 18-21, 2017  
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Save the Date!  
#AIIP17

Laissez les bon temps rouler!

Let’s get together at the Hampton Inn & Suites in New Orleans, Louisiana on May 18-21, 2017 and let the good times roll!