

The Orientation and Training of New Librarians for Business Information

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ABSTRACT. New business librarians and nonbusiness librarians serving business needs require training and orientation to the unique aspects of business librarianship. Formal training programs can be devised to raise competencies in providing core business information services. Given the pace of change, such programs must emphasize flexible and adaptable approaches to finding information, rather than reliance on specific sources. Trends in the business information environment will likely favor greater use of just-in-time training and knowledge databases.

KEYWORDS. Training and development, business reference, core competencies

INTRODUCTION

Business librarians do not enter into the world fully formed and often do not begin their library careers with a clear focus on business. Many different factors in individuals' educational, work, and personal backgrounds combine to lead librarians on the path to business librarianship. When librarians enter the field without a common starting point of shared experience, an initial orientation to the unique aspects of business information

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provides an essential foundation for success. This article discusses issues involved in the training of entry-level librarians in the basics of business librarianship.

ENTERING THE PROFESSION

Studies of the educational background of academic business librarians have consistently shown that only a minority in the field have formal training in business or related disciplines at either the undergraduate or graduate level. Liu and Allen (2001) found that 23.8% of practicing business librarians at accredited business programs had a second master's, such as an MBA or degree in a related field, and an additional 15% had business training at the undergraduate level. This was only a slight increase from Kendrick's (1990) finding of 17% of business librarians with master's degrees and 10% with undergraduate business degrees. The cultural and compensation differences between the library and the business workplace make it difficult to attract large numbers of previously trained business experts to libraries. As Liu and Allen (2001) stated, "The overall picture, then, is of professionals working in a specialized area who are scrambling to obtain the expertise they need to function effectively in that context" (p. 562). The authors went on to suggest potential joint programs between library and business schools to remedy the problem, but this seems impractical in today's educational environment where funding and time are in short supply.

If this is the state of affairs in larger academic programs, small college libraries and public libraries must have even more difficulty finding formally trained business librarians. In the U.K. context, Considine (2005) discussed the shortage of business expertise in public libraries and the consequent need to train librarians in-house to provide business services. O'Connor and Marien (2002) provided further evidence on the recruiting dilemma for business librarians.

In addition, the number of library schools offering specialized courses in business reference (as well as the number of students taking those courses) appears to be on the decline. Given these realities, it is unrealistic to expect new librarians in a business library setting to enter with much of the knowledge needed to function effectively. On-the-job training and retraining is the rule for most business librarians.

Corporate librarians are a special case. Librarians entering this sphere tend to have more direct business experience, whether from prior work or education. However, the world of corporate librarianship is also changing.

As physical collections and staffs are reduced, librarians are redefining themselves and integrating themselves into the workplace as embedded information professionals (Chindlund, Chochrek, Scanlan, Shumaker, & Stich, 2005). Due to corporate librarians' unique experiences and the fact that they often work solo, much of their training and orientation will have to be self-initiated.

UNIQUE BUSINESS NEEDS

Regardless of setting, business reference and collection development present special challenges. Lavin (1995) provided an excellent discussion of the unique nature of business reference, describing the typical business patron's urgent need for current information. Atkinson and Figueroa (1997) provided early empirical evidence of the business patron's time-sensitive approach to finding information: patrons would often simply end their search abruptly when their time budgeted for the task was reached. According to Wilkins (1999), "patrons are more likely to be demanding, time sensitive, and carry high expectations about the results of the library visit regardless of their individual fluency with libraries" (p. 40). Librarians must develop reference strategies and techniques for simultaneously speeding up their delivery of information and slowing down patrons to the point that an effective reference interview can take place. The training of new librarians must develop comfort with not only the content, but also the style of business reference interactions.

Another challenge to the new librarian is gaining expertise with the vast array of competing and overlapping business publications available in print and online. Unlike many academic disciplines—which may be structured around a major index, a list of top journals, and a few key reference sources that constitute the core of knowledge in the field—the contours of business information are constantly changing, and patrons' needs can be met in a variety of ways. Each particular type of reference question may have several resources that can provide an adequate answer. Each library will have its own mix of databases and print sources on hand, and this selection may change frequently in response to vendors' new offerings and pricing. The librarian training for business reference must learn to be flexible and to blend his or her knowledge of resources with patron needs to provide a unique concoction for each query. In-depth knowledge of specific sources may come with time, but it should not be an immediate goal when orienting the new librarian.

Wilkins (1999) gave an excellent description of the stages necessary for successful training. Helping the trainee understand the psychology of the patron, the patron's typical questions, and the usual resources that will provide answers gives the trainee the broad context needed to develop comfort and confidence in his or her abilities to respond to questions. This will be necessary to properly negotiate the reference interaction and to recognize the underlying information needs in their various guises beneath business jargon.

Many business information resources also differ qualitatively from the standard range of books, journals, and indexes that library school students are usually exposed to. At a minimum, the new librarian must develop comfort with numerical data sources and be able to deal with requests for the Dow Jones Index with the same ease as requests for the Periodicals Index. Training must also provide practice on databases containing unique bodies of business material such as financial statements, annual reports, or accounting regulations. Although these sources are often not as complex as they first appear, the orientation process must include explanations and demonstrations of these sources, which are otherwise dauntingly unfamiliar.

Another unique need of business patrons is the heavy demand for current demographic and marketing data and forecasts. In addition to knowledge of basic sources, the new librarian must be trained in matching highly specific queries to data that may be available at a more general level, and in making referrals when necessary. If the patron really does need to know a piece of information that is not available from public sources, they can often directly contact industry associations, government experts, or library colleagues through services like the BUSLIB-L list to get an inside track on the information. The nature and scope of referrals to outside contacts is another unusual feature of business librarianship.

Going beyond reference, the new librarian with collection development responsibilities in business will need to appreciate the characteristics of business vendors. With prices driven by the corporate market, most libraries will always find it expensive to acquire key business information resources. The same pressure for currency and specificity of information influences the selection process for business resources. The business selector must begin to learn the art of balancing need and cost to develop satisfactory, if not ideal, collections. Learning about specific vendors can be facilitated by attending conferences with many exhibitors and presentations on resources, such as the American Library Association (ALA) or the Special Library Association.

THE TRAINING PROCESS

Any training program should be founded on sound basic principles of librarianship. General training for all public services staff is useful (Mozenter, Sanders, & Bellamy, 2003) and to be most effective must be supported with release time and appropriate incentives (Buchanan, 2005). For reference, learning basic techniques for keeping patron interactions focused on quality service is very important (Macke, 2005). Business training can make use of any general training components for librarians that already exist at the library.

All librarians and staff who work with business information will benefit from additional training to respond to the specific business needs described above. Often the most comprehensive and complete method to raise awareness is a formal program. As Lavin (1995) stated, "Establishing a formal in-house training program requires effort and may be mistakenly perceived as a luxury, but the payoff can be remarkable" (p. 94). Tucker (2004) provided the most recent and thorough description of a systematic business reference training process in the literature. At the University of Nevada, Las Vegas (UNLV), Tucker developed a program for 29 staff members at two reference desks. Given the large number of staff to be trained, Tucker created a structured process with workshops, lists of resources, and homework assignments in three major categories of business information: company information, industry information, and market research. Tucker reinforced the initial training on specific sources with contextualized sample questions and follow-up quizzes to test mastery of concepts. Specific goals were set for raising information competencies, which were assessed through performance on the homework assignments and a survey.

For large and frequently changing groups of staff such as student workers, an automated tutorial can be an effective introduction (Kathman & Kathman, 2000; Poole, Grieco, & Derck, 2001), but this approach may not be appropriate for the training of small groups of librarians specializing in business.

At Rutgers University, Womack (2007) maintained a training manual for new librarians and information assistants at the Kilmer Library, the primary business library on the New Brunswick campus. The training manual provides context for the individualized on-the-job orientation provided by Womack, covering the most significant local business information sources, along with examples of typical questions and reference issues. This style of one-to-one training is more suited to small numbers of new librarians. Typically no more than three new reference desk staff per semester are

hired at Kilmer Library. Hires range from first-year library school students to experienced post-MLS librarians on temporary assignments. The training at Rutgers also covered the three basic areas of company, industry, and market research, along with material customized to the new hire's background. Sometimes new librarians are interested in in-depth learning in an area of potential strength, and sometimes additional training is necessary to bolster areas of unfamiliarity.

Wilkins (1999) provided further detail on the need for training to properly orient new hires to the culture of the organization and the local business patrons. Local operating practices can include special instructions and passwords for accessing business databases, as well as information on tiers of service available to different user groups. If the librarian has collection development responsibilities, there will undoubtedly be a number of local practices and procedures to learn in connection to budgets and acquisitions.

Training also should provide a crash course in the business terminology that creates difficulties in understanding for those not familiar with the field (Muchin, 2000). Librarians must learn the lingo of 10-K's, tickers, and ratios to decipher reference queries and select resources. One specific example is the "risk-free rate of return" that is described in many textbooks and student assignments as though it could be located under that title. To field these questions, the new librarian must be taught the appropriate T-bill and bond rates that serve as measures of the risk-free rate of return in the real world.

Beyond language, the style of many business information needs is quite different from the norm for libraries. Rarely will a patron say, "I need to know more information about X." Instead, the librarian is likely to hear the desire for a specific outcome to a demand and, to be frank, business patrons can be somewhat pushy compared to other types of patrons. Training must include discussion of strategies for defusing such situations and ways to gently guide the business patron towards a suitable reframing of the question and a suitable expectation of an answer. Although actual experience in these situations will always be necessary for the librarian to increase their confidence and ability to handle difficult business reference questions, proper training can speed the learning process. At the same time, new librarians must be cognizant of their limitations and be taught the appropriate point to refer questions to those with more expertise.

Local training programs and materials should also be supplemented with other resources. The Business Reference and Services Section (BRASS) of the Reference and User Services Association (RUSA) in ALA maintains many useful resources for new librarians, including the *Core Competencies*

for *Business Reference* (2007) that reviews key information resources on a number of business topics.

More difficult to formalize, but equally essential to the training process is the inculcation of a curious, problem-solving spirit in the new librarian. Maintaining awareness of business resources and responding to changing patron needs requires active investigation on the part of the librarian after the initial training phase ends. A sense of wonder and excitement at discovering the information that lies behind the newspaper headlines can compensate for many gaps in formal education. Mastering the challenges of a new subject area should be a source of satisfaction and not frustration for the new librarian. More experienced librarians should model these attitudes for their junior colleagues. Informal in-house traditions such as the swapping of difficult questions at reference meetings are often the best way to accomplish this goal (Wilkins, 1999).

On-the-job learning and development continue throughout the business librarian's career, and after an initial structured orientation, the librarian will need an ongoing approach to learning. Formal and informal mentoring opportunities should be made use of at the local library level and at the national professional level (Fiegen, 2002). New librarians should be encouraged early on to take responsibility for staying professionally up-to-date. The role of the professional association in furthering the development and adjustment of the new librarian is described by Juricek (2007).

THE FUTURE OF TRAINING

It may be appropriate at this point to speculate about how the changing library environment affects the need for training in the future. As mentioned above, business information needs evolve rapidly in response to the volatile real world of business, and competition among information providers has resulted in a succession of changes in format and functionality of major resources. A formal training program must be constantly updated to reflect these changes. It should also be designed so that the trainees do not become locked into a particular pattern of finding information, a pattern that will inevitably break down as old sources are discontinued and new information needs arise.

Already librarians have seen the impact of the "Googlization" of reference, with the answers to commonly asked, standardized questions often easily surfacing in a quick Internet search—a result that disintermediates the role of the librarian in the search process. For example, no one asks

where they can look up stock prices anymore. In contrast to Wilkins' (1999) description of the common buzzwords of sources that patrons would ask for by name—S&P, D&B, SRDS—the patron of today is less focused on specific sources. Instead, patrons often come to the desk out of frustration with a Google search gone awry. Their information needs are much more individualized and require lengthier efforts to solve. Training has to respond to this reality. Neuhaus (2001) describes the need for a continuous, individualized, flexible, hands-on approach to training, arguing that this is more effective than traditional formal training programs. Kutzik (2005) discussed the virtues of just-in-time training for new technology skills, but this approach can be applied to training in business librarianship as well. Training units can be modularized and offered as individual brief lessons in response to emerging needs. Often the same instructional materials can serve patrons and new librarians alike when properly designed.

Taking this atomization of information needs to its furthest extent leads to the development of searchable repositories of specific knowledge. A highly successful implementation of this approach is the business FAQ originating from the Lippincott Library of the Wharton School (Halperin, Eichler, & Khanna, 2006). As technology advances, the capabilities of databases to store and make available knowledge encapsulated in interactive guides, video tutorials, and the like will only increase. The work of training will then become providing new librarians with the basic skills to absorb this knowledge, and on designing of the architecture of the knowledge repository itself. Certainly with a well-defined architecture and interface, the trainees and learners can capture their new experiences as they learn and create their own educational modules to pass along. The success of Wikis in today's environment is only the most visible example of this approach.

The development of dynamic content that can not only be viewed and searched 24/7, but also created and edited continuously from any location, is a powerful tool that has yet to be fully exploited for training. The future development of these expressions of the collective mind of expert librarians should allow the dream of continuous just-in-time training and learning to be realized at some point. However, the subtle inferences at play in the very human interaction of the reference interview, and the development of critical judgment in the use and selection of business sources will continue to demand person-to-person transmission of information to new librarians. Just as electronic resources are taking away some of the routine work involved in explaining to patrons exactly how to use a particular source,

the routine aspects of training can be automated to allow the higher level functions of mentoring to come to the fore.

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