A Brief History of Information Brokering

Marilyn M. Levine

Information brokering, the business of buying and selling information as a commodity, has been around for a long time. A business historian can make a good case that it started with Gutenberg in the middle 1400s, when what had been a closely held church and government prerogative involving the distribution of “original works of art” gave way to mass production and the business of book publishing.

By the 1700s, faster, time-sensitive techniques for information distribution took hold. First the newspaper and then the magazine made smaller, but timelier, chunks of information available to the public, and venture capital investment opportunities were available for those who wished to back entrepreneurial publishers.

Information brokering as we now think of it as a business opportunity for the individual information professional was begun by the French in 1935. (This history is documented in the 1987 book *Passion SVP: Femme et P.-D.G.*, by Brigitte de Gastines in collaboration with d’Alice Hubel.)

Brigitte de Gastines is President-Director General of SVP France and the daughter of the company’s savior, Maurice de Turckheim. In her book, she describes the birth of SVP as a profit-making or fee-charging entity.

The concept came from the Société Française de Radiophonie, an organization of professionals who created the notion of supplying information over the phone for a fee. In 1935, members of the society convinced the French governmental postal, telephone, and telegraph agency (PTT) to reserve the letters SVP (for s’il vous plait, “if you please”) on the telephone dial for dial-up question-answering service for Parisians. Though the service got off to an enthusiastic start, the financial situation deteriorated rapidly, going from bad to worse to catastrophic. With significant debt piling up, the struggling business attracted the attention of Maurice de Turckheim.

Joining the group in 1937, he set out to strengthen SVP with his considerable promotion and marketing skills. His big break came several years later.

After World War II, France, like much of the world, had to pull itself together, and SVP, guided by Maurice de Turckheim, was resurrected. Turckheim’s strategy was to play on the belief of the average person that the upper classes were privy to all sorts of secret information. Using this knowledge, he would invite people to join his “exclusive club,” which let them in on all the information secrets they wanted for the yearly price of admission, a hefty subscription fee.

The strategy worked and by 1950 the operation was in full swing. Over the next 30 years, SVP became a worldwide operation with franchises in 23 countries on five continents.

In the meantime, several entrepreneurs in the United States found ways to enter the not-yet burgeoning information business. Among them were Matthew Lesko, who turned a home-based newsletter on how to get free information from federal government agencies into a $750,000 a year business, now called Washington Researchers, and Roger Summit, who began his ground-breaking work that spawned the online industry.

In spite of the entrepreneurial activity, however, librarians were slow to realize that they could leave the confines of the buildings which named their profession to perform fee-based services on a free-lance basis.

Darlene Waterstreet of Badger Infosearch in Milwaukee, Wisconsin, may have been the first to point out the building-restrictive warning message implicit in the library/librarian naming convention: The person and the building were socially perceived to be joined like Siamese twins. The more daring librarians, like Susan Klement and Alice Sizer Warner of Warner-Eddison, and Kelly Warnken, separated themselves from the building, then went around telling others how it was done. What they were doing was diffusing an innovation, as described in Everett M. Rogers’ 1962 communication theory classic, *Diffusion of Innovations*.

Moving Librarians Out of the Library

The American Society for Information Science (ASIS) was itself a major force in the drive to divorce information from the library. To ASIS members, information was not only recorded items of knowledge, it was also the digitized bits of information that could be moved through computers and telephone lines to where it was needed, rather than requiring users to come to the place where knowledge or information was stored. In this approach, people stayed where they were; information moved to them.

By the late 1960s, there were sufficient private, for-profit

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This issue of Connections looks both forward and backward. With this all-electronic edition, we are moving into the future (or is it just the present?). While the main reason is cost savings (three-quarters of our costs have gone to printing and mailing), electronic distribution means that Connections will be available to readers as soon as our layout is complete. We are making the transition gradually: the current issue looks very much like the print edition. Once we master the features of electronic publication, we may be able to try out some innovations that take advantage of a more timely publication schedule. We’d like your feedback and welcome suggestions for how to make the electronic Connections further serve your needs.

But while we are moving ahead technically, the theme of this issue, “Change and Development in the Information Profession,” looks primarily at the history of our profession. The articles in this issue cover a wide range—from 1453 to 2029! AIIP founder Marilyn Levine traces the information industry back to Gutenberg; that’s not surprising, but did you know where and when providing information for a fee started? To find out, read Dr. Levine’s 1995 article, “A Brief History of Information Brokering,” which we are reprinting with the kind permission of ASIS&T. Another AIIP founding member, Johan van Halm, offers a European perspective that considers the role of professional associations, including AIIP, in defining the industry. Johan also looks at how, over the years, independent information professionals (IIPs) have had to adapt to the challenges of a changing market.

Amelia Kassel covers much of the same terrain as Johan, but looks at the changes of the past twenty years from the perspective of the daily practice of an IIP. Wolfgang Gunther describes the evolution of the information world through an entertaining account of his own personal transformation from a scientist-user of information to an independent professional. Barbara Quint (bq), however, will have none of this: she turns her back on the past and looks resolutely forward 25 years out to what she calls “Y2K29.” Rounding out this issue’s theme, Susanne Bjorner and Josh Duberman offer perceptive reviews of a major new scholarly book on the early history of online information services.

Outside our issue theme, Jane John continues her column on science and technology searching by introducing a “two-step” technique for researching the consumer electronics market. Mary Ann Shew reviews two important books by Alan Weiss, who will be the keynote speaker at the 2004 AIIP conference.

This will probably be my last issue as editor of Connections. It has been a rewarding experience, not least because of the people

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President's Message
Cynthia L. Shamel, Shamel Information Services, cshamel@shamelinfo.com

AIIP: The Association of Independent Information Professionals. This is the fourth installment in our look at the four words that define our organization. We are professionals. We are not information technicians or clerks or assistants or dabbler or aides. We are professionals. What does that mean, anyway? How does it make us different and how does the information professional fit into a changing industry?

The best story I know to explain what makes us different comes from Harry Beckwith's book, Selling the Invisible. It is called "The Carpenter Corollary to the Picasso Principle." For the Picasso Principle, you'll have to buy the book.

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As AIIP members and friends gather in Austin to share knowledge, wisdom, experience, challenges, and successes, I appreciate the opportunity to meet those of you I have not yet met and to become better acquainted with the rest of you. Our members include the crème de la crème of the information industry, and it has been my privilege to serve as Association President this past year. I will take this opportunity to thank the dozens of committee chairs and committee members who have worked to deliver the excellent programs and benefits we all enjoy. To identify some of these unsung heroes, go to the AIIP website/Members Only/AIIP Info/Committee Chairs: http://www.aiip.org/members/AIIPInfo/committees.asp. Profess your thanks by sending them a note. It would be much appreciated, I’m sure.

Finally, I have had the honor of working with an incredibly dedicated and professional board of directors, and I extend most sincere thanks to Pam Wegmann, immediate past president; Mary Ellen Bates, president elect; Karl Kascia, treasurer; Debbie Wnyot, secretary; Kent Sutorius, director; Sheryl Ranes, director; and Angela Kangiser, director, for making 2003 another great year for AIIP. cshamel@shamelinfo.com
A Brief History of Information Brokering

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information companies in the United States to encourage a group of database producers, managers and operators to launch a trade organization to serve their interests. In 1969, the Information Industry Association (IIA) was formed and held its first meeting, which merited coverage by the trade in Publisher’s Weekly (April 14, 1969).

In celebration of the 200th anniversary of the American Revolution in 1976, when people throughout the country were encouraged to look at revolutionary concepts of the 20th century, ASIS turned the spotlight on information-on-demand services and gave them full-issue treatment in the Bulletin of the American Society for Information Science (February 1976).

Also in 1976, Susan Klement created the first outline of a course on being an information specialist outside of a library building: “Draft Proposal for a Graduate Course on Alternatives in Librarianship” (Canadian Library Journal, April 1977). She included, in a separate article in the same journal, a 41-item “Selected Annotated Bibliography of Articles Relevant to Alternatives in Librarianship.” Though faculty members in schools of library science at leading universities claimed to have taken note of these new career possibilities, the concepts were rarely incorporated in their classes. But entrepreneurial librarians and publishers had seen the wisdom in alternative careers.

In 1980, Betty-Carol Sellen convinced Gaylord Professional Publishers to publish What Else You Can Do With a Library Degree. Although many people remember Betty-Carol’s book as asking the question, “What else can you do with a library degree?” this collection of first-person accounts outlined the wide range of alternatives available to a library school graduate who wanted to be independent of the library building.

One of the alternatives already documented by that time was free-lance information brokering. By 1977, enough people had gone that route to justify Kelly Warnken’s first self-published Directory of Fee-Based Information Services. With 87 entries on 74 pages, including both academic-based and free-lance information service providers, the book took a well-known technique of information organizing, the traditional directory format, and applied it to this new field. (Helen Burwell of Burwell Enterprises, Houston, Texas, now publishes the international edition of this directory, still a self-published product.)

In 1981, R.R. Bowker entered the field to publish Warnken’s The Information Brokers: How to Start and Operate Your Own Fee-Based Service, indicating how far the field had come.

Expanding the Field with PCs

By the early 1980s, librarians and many others had begun to

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A European Perspective and Some Personal Experiences Related to “Change and Development In The Information Profession”

Johan van Halm, JvH Information Consultancy, JohanvanHalm@cs.com

I have been active as an information broker and as a consultant for more than 25 years. I started my own business as the first commercial information broker in Europe by representing Information Unlimited, the company founded by the late Sue Rugge and Georgia Finnigan, who have been my peers in this business.

After some cash flow problems in the second year, I was able to establish myself permanently in the information and library business and have always enjoyed a nice annual income. My clients are either information users (libraries and corporations) or information producers, providers, or aggregators, as well as software suppliers/facilitators in this area. My activities include evaluations, user surveys, marketing, strategy development, business development, visibility projects, joint ventures/cooperation projects, brainstorming projects, recruitment (Top Jobs), and seminars.

Professional Associations

Professions begin to develop with so-called professional activities, like education and training, and establish associations with meetings and communication activities. After a certain time some professions no longer feel at home in a general “association,” and found associations of dedicated professionals.

The professional associations of information brokers and consultants are a product of the late eighties, when their numbers were growing considerably. In 1987 the Association of Independent Information Professionals (AIIP) was formed in the U.S. at Milwaukee. EIRENE—the European Information Researchers Network—started in 1989, but with limited membership, mainly from the UK, it didn’t become a powerhouse like the AIIP, and closed its doors in 1999. In France, the AF2I1 has existed since 1991 and in Germany a “Ring der Informationsvermittler” (Circle of Information Brokers) existed for a while within the DGD3 (now DGI3).

These dedicated professional associations have been of paramount importance, as they put the independent profession on the map, making us “lonely cowboys” part of an industry. The membership label also helps when you try to sell your services, since it helps to create a form of branding. I am personally active in a number of national and international library and information associations. I’m chairman of the EUSIDIC (see the Appendix, below), on the board of the European Library Automation Group (ELAG) and the Dutch Platform Informatic Management (PIM), an association of independent information brokers and consultants. I’m very proud to be a founding member of AIIP, which is now flourishing in a way no one had expected in 1987. In the 1990s I organized the European Information Brokers’ Meeting and ECLIPS (European Convention of Library and Information Providers), after starting in 1986 with the Dutch Online Information Conference.

Changes and Developments in the Information Industry

Information industry in general

The information industry as such is faced with a paradigm change. Libraries are changing from warehouses to information providers, based on the principles of information and knowledge management. Publishers have to make strategic decisions over positioning their electronic products in global or niche markets. Hosts are developing from classical suppliers of secondary information into providers of Internet-based, value-added products and services.

Brokers and intermediaries are forced to enter the value chain of their customers at the highest possible level to offer them value for money and—hopefully—to make more money themselves. One can no longer survive by offering print articles and printed/formatted searches only. Delivery has to be integrated in the workflows and workstations of the (end)user!

New players will enter the market who will combine IT skills with expertise in the area of data and knowledge management. All will be forced to reorient themselves in order to help scientists and managers do their job more efficiently and effectively.

Outsourcing becomes increasingly important challenges AIIP and PIM members to assist the library and information services sector. Management skills like negotiation, cooperation, and knowledge of consortia and virtual communities have now become indispensable. Another interesting development is the discovery by the content management (CM) sector (e.g., aggregators, database producers and providers) of the information content sector (e.g., entreprise solutions companies, IS departments, and data integrators dealing with internal information) with its legacy of structuring information for the sake of better retrieval via metadata and SQL databases (for the storage of structured data).

User services and user expectations

In the past, users of information were concerned about content, but now they have to assess a variety of more- or-less-comfortable platforms for the same content. Important issues here are: the quality of the interfaces offered by aggregators, the choice and quality of content, and its metadata.

One of the biggest challenges in the future will be the storage and retrieval of unstructured data, which count for more than 80 percent of the stored data. We, the (traditional) information industry, are learning from the CM sector how taxonomy and
ontology principles provide us with context relationships leading to better and more meaningful search results.

Today the core problem of information management is not the provision of more information, but how to cope with information overload, and our biggest challenge is the ability to help the user to digest that information.

We are seeing a more distinct segmentation regarding information usage:

- In academia the Internet is the most used resource.
- Users from industry need internal systems predominantly with external information integrated at the working place.
- Users from SMEs (small and medium sized enterprises) have a limited awareness of external information, which they couldn’t afford even when they would like to buy it.
- Users also want more patron-initiated services (myServices).

**Licensing and new business models**

Providers and users are concerned about new business models, such as pay-per-view. Part of such a solution will be a new price model which is less rigid and more flexible. Examples might include an initial fee for unlimited access to core collections or resources, a similar initial fee but with a usage-dependent component for frequently used resources, or a pay-per-view arrangement for less frequently used material.

**Information marketplace-market space developments that will affect the broker business**

Our sector is faced with many new developments. Brokers and consultants have to honor and anticipate as many of these as possible:

- Disintermediation, as users buy increasingly direct via B2B mechanisms and convergence of services
- Users expect to be sold an “experience” rather than a product and services portfolio
- Online platforms that allow customers to design products and services to suit their own specifications (myServices)
- Mass customization by providers
- Providers who are building customer share rather than market share, and count profitability by individual customer, rather than by a market segment or group of customers
- Customer loyalty-building
- Outsourcing by the customers of the brokers and by the brokers themselves
- Companies that are unable to sustain competitive advantages (patents, rights, content, etc.)
  - Because competitors are quick to copy any advantage
  - The only sustainable advantage is to learn and change faster
  - Brokers can assist in this effort
- Franchising arrangements with successful broker companies
- More cooperation
  - The requirement of better marketing

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A European Perspective

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- A larger spectrum of products and services on offer
- Finding more “niches” by specialization and consulting
- Interoperability with and integration in the customers’ infrastructure
- Consolidations, mergers and acquisitions
- Coping with electronic journals versus the traditional documents or articles
- Delivery via right arrangements
- Integration⁶: enterprise solutions and intranet delivery

Is there a future for brokers, libraries, and information services?

Under certain conditions, there is a bright future! To operate as meaningful service organizations in the new millennium, information brokers must become highly proficient, technology-driven learning organizations, where the employees are well trained and equipped to provide the best service possible. Staff must be ready to master change and provide new technology-based services.

Only intermediaries that provide such value-added services to their users will survive. A user who is able to get the same information online will not use a physical broker unless that broker offers him some combination of higher quality service (better metadata for example), the right quantity, and integration in workflows via interoperable delivery mechanisms, but less fragmentation and more aggregation, a comfortable environment, 24 hours a day, 7 days a week (24/7) and 52 weeks a year, year-by-year. qijp

Johan van Halm is the principal of JvH Information Consultancy in Amersfoort, The Netherlands, is current Chairman of EUSIDIC, and a founding member of AIIP

Appendix: EUSIDIC

EUSIDIC is an acronym for the “European Association of Information Services,” founded in the 1970s as the “European Society of Information Dissemination Centres,” following the model of its American sister association, the American Society of Information Dissemination Centers (ASIDIC). Like ASIDIC and another American association, the National Federation of Abstracting and Indexing Services (NFAIS), EUSIDIC acts as an umbrella association of different groups with a common interest. These three information industry groups represent information users, such as corporate information managers, university librarians, and representatives from the information industry – information producers, providers, and aggregators.

EUSIDIC differs from the two other associations because of the nature of its members—users from corporate, government, and university libraries as well as information providers. This fact makes EUSIDIC a unique meeting platform,⁷ used to communicate and to share information and services.

1 AF2I: Association Française des Intermédiaires d’Information
2 Deutsche Gesellschaft für Dokumentation (German Society for Documentation)
3 Deutsche Gesellschaft für Informationswissenschaft (German Society for Information Science)
4 Of the 29 founding members of the AIIP, 26 came to Milwaukee (Midway Motor Lodge, Milwaukee Airport) 3–6 June 1987. They came from Austria, Brazil, The Netherlands, and 12 states of the US. The meeting was convened by Dr. Marilyn Levine, and Helen Burwell was chosen as AIIP’s first president.
5 By information overload, personal or organizational, we mean:
- having more relevant information than one can assimilate
- being burdened with a large amount of unsolicited information, some of which may be relevant
6 There is more integration: between disciplines, of types of information and types of media, of information and knowledge, in the community, and in B2B services.
7 EUSIDIC’s annual conference will be held in Helsinki, 17–20 October 2004. The theme will be “Content ownership versus platform ownership.”
I began my business in 1982 after interviewing a handful of librarians turned information brokers around the country. For the most part, each worked alone. Two worked part time with hopes of expanding to become full-time businesses. I was rejected, too; some said: “We’re not going to tell you how we did it; we’ve worked too hard to get where we are.” Those willing to reveal their experiences talked about the joys and challenges of providing research services for a fee.

With stories in hand and advice to purchase a personal computer instead of using a computer terminal with modem, I was inspired to move forward and was enthusiastic, despite the potentially daunting life experience I was about to pursue. I made a point of finding anything and everything on the subject of information brokering and discovered a few pamphlets, articles, and one book. I then plotted next steps and the rest is history. (See Suzanne Sabroski’s Super Searchers Make it on Their Own, with a chapter about yours truly.)

From just a few people to talk to about the field in 1982 to the present time, we’ve jumped a long way forward, facilitated by AIIP, which began in 1987 with 26 founding members. Today, AIIP provides prospective and new independent information professionals (IIPs) with the AIIP-L discussion forum for business and research questions. Several hundred potential responders provide answers and insights. New IIPs and long-time participants in the field acquire knowledge from each other about business development, research methods, technology, trends, and issues such as copyright and Google.

Today, IIP clients avail themselves of an array of services offered by researchers, consultants, and experts represented by AIIP’s expanding and diverse membership. Overall, areas of change between the early eighties and now relate primarily to: (1) The independent information professional (IIP), (2) technology, and (3) services.

The IIP

In the early days, many of the IIPs I came to know were primarily from library backgrounds. When PCs hit the desktop in the early eighties, librarians and others working in various types of library settings—aware of online technology and library organization and management—were in a position to create a business from home or office. At the same time, online databases began to grow in numbers and types—from bibliographic databases to full-text databases; from a handful of databases in medical, education, and sci-tech fields to business and news databases; and from a few to thousands, some first aggregated into one system by Dialog with LexisNexis on their heels, and then by Factiva (formerly Dow Jones Interactive.)

In the early days, information brokering was an alternative career for librarians who were willing to take a risk. Touched by technology that opened a new world, some, like myself, began online research businesses while others became library, information, or database-development consultants. As time marched on, professionals from other disciplines became interested in providing information services.

Today the field consists of librarians as well as primary, secondary, manual, and telephone researchers; private investigators and public records researchers; attorneys who conduct research, often for other attorneys; document retrieval firms; searchers who specialize in the nonprofit sector; consultants, authors, publishers, editors, Web developers, content specialists, database developers, and more. Industry and subject specialists provide services to specific market segments and professions. Some remain generalists founded on basic online or other research skills, while others specialize, based on their previous background and education.

Technology

Technology, the key enabler, continues to play an influential role in identifying, developing, and growing an information business. The desktop revolution created the environment in which I began during the eighties, and it goes without saying that the Internet radically changed the world and how IIPs work in the nineties. Some of the challenges were, and continue to include, information overload and keeping up with hardware, software, and new search tools. All of this takes a large chunk of the way we spend our time. Nevertheless, the vital benefits of groundbreaking technology are twofold: (1) new options for conducting research that produces astonishing results and (2) plentiful opportunity for fashioning interesting and successful businesses by those who harness technology for diverse constituencies.

Research

Although I began by conducting research using commercial databases, today I use an array of search tools. The majority of my projects require that I combine Internet research with commercial database searching. Telephone research is a key service provided by many IIPs and I recommend it regularly to my clients. Based on the increasing awareness and need for market and competitive intelligence to compete in the global economy, working with fellow researchers worldwide is growing.

Today, many clients want reports. Since the field is dotted with industry and subject specialists, reports not only contain summaries but also synthesis, analysis, and recommendations depending on client requirements, budgets, and turnaround times, as well as the background of the IIP. When IIPs don’t have all skills or time necessary to fulfill every requirement, they can subcontract some or all of the work. Participating in AIIP, with

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its global network of experts, facilitates this process to a great extent. Members meet and learn each other’s specialties and talents. Cross referrals and business with one another generates new opportunities and is a huge advantage. It’s much easier to do business with other IIPs who know and understand your services than to educate the world. Working with colleagues reduces the time and expense it takes to market to uninitiated or unqualified users. All of this amounts to business growth and profitability.

IIPs are a dazzling community of information professionals. They continue their exploration of technology to develop and expand services that benefit clients. In spite of changes, one inexorable fact remains the same today as in 1982 when I began: Although there are ups and downs and frustrations and elation, life as an independent information professional is a creative and exhilarating experience.

Amelia Kassel is President of MarketingBase, a worldwide business, market, and competitive intelligence research firm started in 1984. She provides an email-based Mentor Program for new information brokers or those wishing to expand their businesses, and offers personalized training in the form of retreats and at conference sites. 

**Perspectives on Change**

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Twenty-five years ago I had never even given thought to being part of such a thing as an information profession. In 1979, I was a research chemist and industrial manager who had always had a great affinity to the technical libraries and collections that facilitated my job. Organic chemistry is funny that way, information doesn’t go out of date. A good prep from 1835 is as good as one invented 150 years later.

So I learned to search the literature in my native and adopted languages, German and English, by hand and through *Chemisches Zentralblatt* and *Chemical Abstracts*. As an undergraduate in Germany and a graduate student in England, I laboriously copied such references by hand, just like all those medieval monks, albeit in much worse handwriting. Then I wrote to the authors for reprints.

I chose a postdoctoral position at Yale University, because of its reported 4 million books. That’s where we witnessed the introduction of several revolutionary technological marvels, chief among them the copying machine in its first guise as Thermofax from 3M Company. Then along came Xerox’s plain paper copier that opened Act I of the information revolution. In 1967 I joined Xerox in Rochester, NY, where I found a compact technical library that contained sizeable collections in the form of microfilms and microfiche. About the same time, *Chemical Abstracts* was just beginning to digitize their records.

Desktop computers were coming in: Xerox had invented the Alto, a construct the size of an under-counter dishwasher with a huge (2 x 14 inches), removable 5 megabyte memory platter and a WYSIWYG display. For us early adopters, that came with daily updates to the operating system; the interface to the programmers doesn’t seem to have changed much. Xerox built about 450 of the $60,000 hand-wired Altos, even gave several to President Carter, but management didn’t think much of the idea of actually producing them. Read *Fumbling the Future* by Douglas Smith and Robert Alexander for an incredible story.

By the time I moved to Eastman Kodak in 1980, the computer revolution was seriously nibbling at the edges of my chemistry profession. The “top secret, need-to-know, eyes-only, burn-before-reading” Kodak sensitizing-dye database already contained about a hundred megabytes of computer-searchable data and the Kodak Research Library was offering search services in Dialog and STN.

I achieved a measure of fame when I managed to synthesize benzotellurazole, a desirable extension of an existing molecule series that had eluded Kodak effort for about 40 years. Before this material and its derivatives could be used, I felt that we needed toxicity data. The biologists wouldn’t touch any bioassay until I delivered a certified data search. It was a no-brainer to ask the library and they promised to look into the matter. I have forgotten the exact charge but it was something like $2,400 later that they handed me a badly-formatted printout on gray, fanfold paper with sprocket holes still attached.

The result contained about half of the information that I already had in my file cabinet under “Tellurium, toxicity.” So I decided to learn to do this stuff myself. The Kodak library staff was most helpful; gave me Dialog and STN passwords and let me fly. Learning was pretty easy since it came with an essentially unlimited budget. After that, I handled critical chemical searches for myself and for many of my colleagues.

Years later, after helping to found a subsidiary and moving to Pennsylvania, still retaining the same convenient logon codes for Dialog and STN, I found myself among about 1500 people being part of a corporate divestiture. I was officially retiring, but spent several months assembling information for my colleagues. It was quite a thrill to have somebody return from an interview trip and tell me: “Boy, were they impressed how much I knew about your company. And its all because you gave me the data.” In retrospect, those were puny collections. There was no Internet. My download software limit was something like 20 kilobytes. Hardly anybody had ever contemplated dealing in megabytes of freely available information from company Web sites. Gigabytes??

The predictable happened. The moment I was actually retired, my former colleagues sent me search jobs, for pay, especially in the patent field, thereby launching a second career. It was Reva Basch who got me into AIIP when I stumbled across her SuperSearchers book. And the rest is history.

Wolfgang Gunther is still filing a Schedule C for WHHG Consulting of West Chester, PA, but a great desire to see more of the world, to create DVD travelogues, keep up worldwide correspondence, and still do a little chemistry, leaves precious little time for paid consulting work.
To heck with the past 25 years. Where will the independent information professional be at the end of the next 25 years?

In 2029, anyone under the age of 35 will never have known a world without the World Wide Web, i.e., a world in which scarcity of information might replace the universal problem of a glut of information. And everyone over the age of 35 will have experienced the problem of information overload so much longer that they will probably not even remember information scarcity.

Successful information professionals will market themselves as the ultimate device to prevent information overload. In some cases, this will still mean “valet” searching, an advanced form of intermediary searching that allows end-user searchers to still do their own searching, but guarantees that they do it on the right sources with the right strategies. Educating end-users to search well will diminish in importance, replaced by work with vendors who will compete to customize information flow for smaller and smaller niches. Consulting with vendors to structure those niche services will comprise the highest paying area of IIP work.

As traditional libraries disappear, morphing into digital feeds with connections to regional or national warehouses of aging print material, in-house, on-staff librarians will perform more customized services for institutional clients. Critiquing data sources will become an important ongoing function; in many cases, an institution’s success and safety will come to be seen as dependent on vigilant verification of data quality. Smaller firms or firms moving into new areas will turn to IIPs to give them the needed “heads up” on quality problems. Information malpractice litigation will lead to substantial expert witness fees for some IIPs.

Web visibility issues will interest a wider and wider range of clients. Businesses will seek the best e-commerce routes, but educational institutions will also want to market distance learning effectively. With the success of the Open Access/Archive movement and the restructuring of scholarly communication as a Web function, scholars, singly and in groups, will turn to IIPs for assistance in putting their work forward. Employers will hire IIPs to “vet” digital candidates.

Some clients will want to reduce Web visibility. IIPs will have developed a set of guidelines that balance the legitimate interests in privacy with national and international issues of security.

Overall, IIPs – like all information professionals in 2029 – will have become much more specialized than their 2004 counterparts. However, two things will remain unchanged, as true in 2029 as in 2004, or indeed in 1979:

- Information professionals will continue to serve the interests of clients to the best of their abilities by bringing those clients the Truth, or as close as they can get to it.

After almost two decades in the trenches of library work, Barbara Quint (aka bq) became an independent information professional—Quint and Associates—and an editor-in-chief. For over a decade, she has edited Searcher: the Magazine for Database Professionals. She also writes a column for Information Today called “UpFront with bq” and bi-weekly NewsBreaks on information industry activities for the Infotoday.com Web site. Her three proudest professional achievements are co-founding the Southern California Online Users Group (SCOUG), initiating the vendor liaison program for AIIP, and having her “wit and wisdom” gathered into a book—The Quintessential Searcher.

A Brief History of Information Brokering

(Continued from page 5)

sense the potential of the free-lance information brokering business. With the increasing availability of personal computers, many people believed that the combination of PC, modem and commercial databases was a natural; librarians added their library skills to the mix and expected to turn a spare room in their homes into money-making business ventures. Articles in a variety of consumer magazines, such as Working Woman, created a tantalizing image of sitting at home and making millions.

Unfortunately, those who tried it were made cruelly aware of how hard it really is to make a dollar in the real world of competition, money and power. But help came soon for those who had the combination of skills, capital and fortitude necessary to start an entrepreneurial business.

In 1987, 26 people came together in Milwaukee to form the first U.S. organization devoted solely to the information brokering profession. With their sights set firmly on building a network among themselves and their colleagues and on aiding struggling entrepreneurs, the group created the Association of Independent Information Professionals (AIIP). dljp

Marilyn M. Levine is an information broker with the Information Express in Milwaukee, Wisconsin.
Book Reviews


Reviewed by Susanne Bjorner, bjorner@earthlink.net

Covering the period 1963-1976, this monumental work will doubtless become the standard treatise on online information retrieval systems and services. In its infancy, the new field of online information retrieval was a research and development activity — basically inquiry and practice — experimented with in academic and government laboratories. Within a bit more than a decade, a fledgling industry had emerged, with four companies selling online services to business, science, legal, and medical researchers. Three of the four services still exist in some fashion today—though they have passed through numerous mutations—and will be recognized by many readers under their current names: Dialog, Questel-Orbit, and LexisNexis. The fourth service, SUNY BCN, evolved into BRS. (BRS no longer exists as an online service, but its traces can be found in the modern Ovid system.)

Two decades in the making, A History of Online Information Services was written by Charles Bourne (former vice president of Dialog Information Services and Director of the Institute of Library Research at the University of California) and Trudi Bellardo Hahn (current Manager of Library User Education Services at the University of Maryland and adjunct professor at its College of Information Studies). For their book, Bourne and Hahn conducted face-to-face interviews with 16 online pioneers, and communicated with many more. They conducted a thorough and extensive literature search (much of it not online) through technical reports and government funding records; system manuals, memos, and intradepartmental reports; conference proceedings and professional society publications; and master’s theses and doctoral dissertations. Bourne and Hahn attempted to verify and synthesize the massive scattered data. Wary of inaccurate personal memories, they checked stories with multiple sources. In the “acknowledgements” they name nearly 100 individuals who reviewed or contributed to portions of the manuscript.

The book determines, documents, and dates the significant steps that led to the new industry of online services. More than 100 industry milestones are highlighted in boxes scattered throughout the text, as well as listed in a chronology of Online Milestones in an appendix. The authors create a snapshot of the early online industry.

Hahn and Bourne use a chronological arrangement and divide the book into 11 chapters. The introductory chapter gives a brief literature survey of prior histories, discusses methodology, and offers the research questions that guided the work. Three chapters present the prototypes and experiments of the early 1960s, university experiments from the mid-1960s through early 1970s, and nonacademic systems from the mid-1960s through

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early 1970s. Four chapters deal separately with the early history of four major systems:

- Lockheed DIALOG and Related Systems, 1961-1972;
- SDC ORBIT and Related Systems, 1963-1972;
- Computer Searching for the Legal Profession: Data Corporation, OBAR, Mead Data Central, 1964-1972;

Chapter 9 picks up the stories of these and several other systems and addresses the “Public View” of the online industry through the mid-’70s. Chapter 10, based in large part on conversations with employees of systems and database producers, and with users, goes “Behind the Scenes” to talk about acquisition of databases, production, marketing, pricing, and customer service issues in building the online industry in the 1970s. In Chapter 11, Bourne and Hahn sum up briefly and answer their original research questions. Endnotes, the four-page listing of online milestones, a 49-page bibliography and a 24-page index (primarily names) complete the back of the book. (A thorough chart of acronyms and abbreviations, and an amusing “Prologue” focusing on the movie *Desk Set*, with Spencer Tracy and Katharine Hepburn, set the stage in the book’s front.)

The authors state that they “tried to avoid a narcotic recital of events.” [p.5] Except for Chapter 10 (Behind the Scenes), it would be wrong to say that they succeeded. This is a scholarly book, replete with endnotes, meticulous citations, and considerable (and generally successful) commitment to objectivity. It is immense and—largely due to the decision to proceed chronologically through more than a decade of multi-year projects involving hundreds of names, dispersed across the entire United States—disjointed, repetitious and tedious. Narcosis can set in. One must delve very deeply and patiently to find the life that filters out through the myriad details in this dense text.

But it is possible, and rewarding, to do so. A careful index and frequent in-text commentary refer the serious reader to prior, and sometimes subsequent, discussion in other chapters. It requires a lot of page-flipping and persistence to follow a story longitudinally from, for example, Data Corporation’s early activities, to OBAR, then to Mead Tech Labs and up to Lexis.

It isn’t always possible to resolve all discrepancies. Three named principals with whom this reviewer has spoken question some of the facts and dates. It is possible to disagree with some interpretations. No one, however, should dispute the importance of the volume in bringing together the widely dispersed records of the new industry. Though a completely coherent story does not spring cleanly from these pages, the book does provide a foundation from which future stories of the events of this time can emerge.

In reading or browsing the work, most AIIP business owners will appreciate the detail about decision-making and the very practical steps that early online workers took to define and sell an unknown technique and service. In addition to skimming through the Dialog and LexisNexis chapters and the summary of milestones, many members will likely find Chapter 10 (Behind the Scenes) to be most interesting. Here, in sections that are not always as well attributed as other parts of the text, are quotes and comments on the wheeling and dealing that accompanied the acquisition of databases by the various systems, determination of producer royalties, establishment of pricing strategies, getting the technology to work, and the trials and tribulations—and successes—of the first customer service and training personnel. Some of these stories have been told before, but there are enough presented so that anyone—even well-seasoned industry participants—can find new chuckles or horrors.

The bulk of the book is devoted to technology: to the competing methodologies of countless projects that made incremental improvements in programming for information retrieval, to the description of painstaking efforts to save disk memory and processing effort before computer power became cheap, to vital telecommunication breakthroughs that eventually coalesced to produce “online.”

*A History of Online Information Services* is not a “must read”
for today’s au courant information practitioners. Nor is it always a fun read. It is, however, a very enlightening read whereby one can honor the considerable efforts of hundreds of individuals, companies and agencies who labored—often without knowledge of each other but also in cooperative competition—to form an industry. The very existence of that industry enables information professionals—indeed, independent or affiliated—to work in their practice with greater efficiency and professionalism than if that formation had not happened.

An AIIP member since 1987, Susanne Bjorner now provides writing and editing services to researchers, and consulting services to print and online publishers. With Stephanie C. Ardito, she is author of “Online Before the Internet: Early Pioneers Tell Their Stories,” a series of interviews appearing in Searcher magazine (http://www.infotoday.com/searcher/jun03/ardito_bjorner.shtml for part 1).

Reviewed by Josh Duberman, Pivotalinfo LLC, pivotalinfo@usa.net

It’s a pleasure to see this recent addition to the literature on the development of online information services. The book is an ambitious mix of technological and personal histories, with descriptions of academic, commercial, theoretical, and practical projects frequently interspersed with interviews and anecdotes. Key milestones and citations help the reader track the evolution of the current online industry through this crucial early period.

The book’s prologue strikes an appropriate note with a synopsis of the 1957 Katherine Hepburn/Spencer Tracy movie Desk Set, a long-time favorite of information specialists for its illustration of the perils of computerized information retrieval (IR). These perils (IR is difficult to do well, incorrect assumptions lead to incorrect answers, and the library staff fears that their jobs will be replaced by a machine) are still relevant today—and this theme, that yesterday’s IR problems are important even now, is often repeated throughout the book.

Co-authors Charles Bourne and Trudi Bellardo Hahn have extensive experience with online information; both served as President of ASIS/ASIS&T, and both have written previously on the history of online information.

Charles Bourne briefly described his own introduction to the difficulties of IR in a 1957 class at UC Berkeley’s electrical engineering department. He worked on a pre-computerized IR project complete with McBee edge-punched cards, a hog-ear notcher to punch the cards, knitting needles to sort them, and a customized subject index (precursor of today’s Knowledge Management taxonomies?). Bourne’s instructor was Douglas Englebart—and Bourne later worked with Englebart at Stanford Research Institute (SRI) in the 1960s, when Englebart invented the mouse and many elements of our “modern” computer-user interface. Bourne went on to participate in many other early IR projects with stints at UC Berkeley and Dialog.

These bits of personal history presented together with the technological evolution of IR illustrate the book’s pronounced intertwined nature, and its emphasis on describing the evolving IR systems from a technological, software and industrial/market point of view. In fact, the introduction states that four themes—systems, service, funding, and pioneers—are woven together throughout. It’s fascinating to learn details about the limitations of the early computer systems, and how the technology and money/markets constrained online development. These developments were also interrelated in time, with simultaneously-occurring developments described in different tracks—as evidenced in the chapter titles below:

Chapter 3: Further Experimentation and Prototypes in Universities, Mid-1960s to Early 1970s;
Chapter 4: Experimental Systems Developed in Nonacademic Laboratories, Mid-1960s to Early 1970s;
Chapter 5: Lockheed DIALOG and Related Systems, 1961-1972;
Chapter 7: Computer Searching for the Legal Profession: Data Corporation, OBAR, Mead Data Central, 1964-1972;

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Book Reviews (Continued from page 15)

However, given the large amount of material covered, I found this chapter organization somewhat hard to follow. I would like to see better finding tools for the reader’s assistance: more depth of indexing, a detailed outline and Table of Contents listing all the subheads and projects mentioned in each chapter, and a complete separate list of all the boxed Milestones in the book (rather than just the appended summary).

As I flipped between chapters, indexes, and bibliography, I realized that this book itself could have well served as an example of the advances in the IR field. MIT Press would be well-advised to consider making this book available online, with actual hyperlinks between themes, projects, people, technologies and cited references. The reader could then more easily trace the field’s evolution, and the book could better serve as a foundation for further discussion.

And, of course there will be lots more discussion on these topics – IR specialists are researchers, after all. One specific example is the origin of the name DIALOG. I was a bit surprised to read that “…the authors were unable to trace the evolution of the name” (p.153); when I asked Dialog founder and AIIP member Roger Summit, he recalled:

I conceived the name during an automobile trip to Portland to visit Ginger’s parents, most likely during the early spring of 1966. As I drove, Ginger was comforting a crying daughter (Jennifer) and I was dictating the proposal for what was to become Dialog into a voice-activated tape recorder. To check my recollection, today (1/1/04) I asked Ginger if she remembered the conversation. Her response follows: “I clearly remember the trip and the conversation. You said, ‘I wonder what we should name the system because without a label it has no identity.’ Then all at once you said, ‘we’ll call it conversation. Y ou said, ‘I wonder what we should name the system because without a label it has no identity.’”


Bourne and Hahn’s book will be a great catalyst to stimulate much-to-be-desired further discussions, amplifications, additions, and corrections as we information professionals participate in IR’s future evolution - often addressing the same challenges that faced these pioneers. Contrast the (paraphrased) quote “Those who can’t remember history – or adequately research it – will be condemned to keep making the same mistakes,” with Esther Dyson’s classic remark: “Always make new mistakes.” Bourne and Hahn’s book should be required reading for both students of Information Retrieval and those currently working in the field.

Josh Duberman is Managing Partner of Pivotalinfo LLC, providing research, consulting, and recruiting services for solutions in business and technology. He worked as a scientist at Lawrence Berkeley Laboratory and Chevron Research, and as an online researcher at SRI International (formerly Stanford Research Institute) and Applied Biosystems. Josh writes about information industries and resources, and can be reached at 425-746-0050 or Pivotalinfo LLC, 15100 38th St SE #819., Bellevue, WA 98006.

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Selected Milestones from A History of Online Information Services, 1963-1976

1963 – SRI demonstrated the first online bibliographic and the first fulltext online search systems.
1964 – TIP was the first online search system to implement stem searching.
1965 – MICRO was the first online search system to allow searchers the option to work in either a novice or experienced-searcher interface mode.
1966 – TIRP was the first online bibliographic search system to provide a means of identification and removal of duplicate records from search output..
1967 – BOLD was the first online search system to be searched from a terminal outside the country in which the computer operated..
1968 – COLEX was the first operational national online search service network.
1969 – Using Data Central, OBAR was the first large-scale use of online full-text searching.
1970 – SUPARS, with Psychological Abstracts, was the first instance of a widely known database made available online on a regular basis to an entire campus community.
1971 – LEADERMART was the first online search service to institute connect-hour pricing.
1972 – NLM and SDC MEDLINE, with TYMNET, provided the first instance of use of a public data communication network with an online search service.
1973 – Either CAN/OLE and RETRO may have been the first online search system to offer a bilingual interface option.
1974 – DIALOG was the first online search service to establish a 1-800 toll-free telephone number for customer service.
1975 – Dow Jones News/Retrieval may have been the first online bibliographic or full-text retrieval system to provide file updates on a real-time basis.
1976 – ILO/ISIS may have been the first online search system to allow search terms entered in one language to retrieve records indexed by corresponding terms in another language.
Science and Technology Watch: Dancing the Two-Step for Consumer Electronics Data

Jane John, On Point Research, jjohn@onpointresearch.com

Clients often ask about unit sales, revenues, and sales trends for consumer electronics and other products. For such questions, dancing the research “two-step” can be a helpful approach.

- **Step one**—Find a table or article that contains a hint of the data you need, though it may not target the right geographical area, contain enough years, or be up-to-date.
- **Step two**—Get on the phone to update the information and find out what else is available from the publisher or author.

Not a complicated dance, you say? True, but busy clients may sit out the dance altogether, working with partial data from an old article, because they do not have the time or data sources to follow up. Let’s assume a client requires U.S. sales figures and forecasts for notebook computers, personal digital assistants (PDAs), DVD players, and several other consumer-electronics products. Here’s an example of a swing around the dance floor.

**Step one**—The Statistical Abstract of the United States contains a chart on one of the products sourced to the Consumer Electronics Association (CEA).

**Step two**—A call to CEA results in a $99 purchase of FastFacts, an online database of statistical tables on about fifty consumer products. DVD players and personal computers are covered. Each table includes unit sales, dollar sales, household-penetration rates, and 3-10 years of trend data. CEA analysts collect the information, but the database is sold through eBrain (http://www.ebrain.org > Research Library > FastFacts > $99 Online Database).

**Step one**—The TableBase(tm) database in Dialog (file 93) is searched using product codes and date restrictions to locate recent tables. Since TableBase(tm) contains geographic codes for all entries, it can also be used to isolate U.S. figures. Some tables are useful in their own right.

**Step two**—Other tables contain only part of the information needed, but calls result in a free chart on PDAs sent by one trade association, and updated figures for 2003 provided by another.

**Step one**—A Current Industrial Report for Computers and Office and Accounting Machines (http://www.census.gov/industry/industry/1/ma334r02.pdf) is available at the website for the U.S. Economic Census. It contains unit and dollar sales for notebook computers, but not for PDAs or DVDs.

**Step two**—I spoke with the Census Bureau analyst who tracks computer products. He explained that in cases where there are only a few big companies involved in a technology, sales figures are suppressed for privacy reasons. This is the case with PDAs and DVD disk drives. They are listed but marked with a capital D—“Withheld to avoid disclosing data for individual companies.” However the analyst did confirm that the data on notebook computers represents the major U.S. manufacturers.

**Step one**—InfoTech Trends on the Web pulls sales and forecast data from individual articles and tags it by both year and quarter. Each record also includes a citation to the originating article and the name of the research firm or author. If you are seeking trend data, you will have to tease out the details—better than trade journal browsing, but not as accurate as time-series data collected by individual organizations.

**Step two**—About eight relevant market-research firms were located for the products of interest. Calls to several firms resulted in price and availability detail on more comprehensive charts, plus confirmation that some of the data needed probably does not exist. Payment options at InfoTech Trends include US $1.00/minute (minimum US $10.00, maximum 60 minutes per day), or a 3-day pass for US $100.00. InfoTech Trends allows you to search a sample year of selected content free to try out their system (http://www.infotechtrends.com).

Analyzing the results at the end of my sample project, I notice that pointers to the best data were covered in just two places—the Statistical Abstract of the United States and TableBase(tm). I have made a mental note to start future projects on consumer electronics in those locations and to use the ‘two step’ approach.

Jane John is the owner of On Point Research. She provides technology focused research for business, market and technical studies.

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**FOOTNOTES**

(Continued from page 3)

I’ve had the privilege of working with—both contributors and the Connections staff. Barbara Wagner and Joann Wleklniski have done an outstanding job as editors, while Eiko Shaul has been absolutely devoted and reliable as advertising director, a position she has now held under several editors. Our other editor, Russ Singletary, who also wrote the Telecom Talk column, has left AIIP to devote more time to writing fiction. Best wishes, Russ! I would like to offer special thanks to President Cindy Shamel and Director Kent Suttorius, who have been most generous in their support for Connections.

The summer issue will focus on the AIIP Conference in Austin. Writing reports on the conference sessions is a great way to break into “print,” and I urge you to volunteer. Other topics of interest to our readers will also be welcome—another chance for you to get a byline. Until the new editor is announced, feel free to contact me with your ideas.
Book Reviews

Note: Alan Weiss, author of the books reviewed below, will be the keynote speaker at the upcoming 2004 AIIP Conference.

Million Dollar Consulting: The Professional’s Guide to Growing A Practice
Reviewed by Mary Anne Shew, ShewTech Associates, mashew@shewtech.com

Whenever I am asked for advice about how to build and run a consulting practice, I always include a recommendation to read this book by Alan Weiss. Independent information professionals would also benefit from its advice and perspective. The author is well known for building a highly successful consulting and speaking practice and teaching others how to do the same thing. He also has a comprehensive web site, http://www.summitconsulting.com, on which he has posted many articles, such as “Addressing Fee Issues in Sensitive Environments” and “Collecting on Overdue Payments.”

According to Weiss, Million Dollar Consulting is intended for “the entrepreneur who wants to build a blazingly successful solo practice.” All of the book’s advice is geared to the solo owner who has, at most, an assistant and a stable of services to which he or she outsources important but non-revenue-bearing tasks.

In Part 1, “Strategy: Establishing Your View of the Profession,” Weiss reviews what a consultant is and is not, how organizations choose consulting help, and emphasizing results, not tasks. While many consultants would shudder at the thought, Weiss introduces the concept of gracefully abandoning clients. “One of the most important elements of [the strategies followed by million-dollar consultants] is to abandon the bottom 15 percent of your market on a regular basis,” Weiss writes.

Weiss classifies a consultant’s added value into six categories: content, expertise, knowledge, behavior, special skills, and contacts. It’s Weiss’s special genius that he recognizes and articulates the differences among the first three categories. He talks about “market gravity” actions, the intent of which is to draw people to the consultant. These actions include pro bono work, commercial publishing (books and articles), position papers, radio interviews, TV appearances, advertising, electronic newsletters, trade association leadership (!!!), networking, and at least a dozen more ideas. Work hard on activities that will attract attention to you and increase your reputation, thereby reducing the effort you have to make in cold calling and finding the right client in an organization.

With these actions, Weiss says, clients will find you instead of you having to find clients — the preferred position to be in.

Once a relationship with a client is established, Weiss offers ten ways to develop what he calls a breakthrough relationship (examples: #1, “Provide Valuable Information,” and #6, “Facilitate Client Publicity”). According to Weiss, the “most important transition period for any consulting business is escaping the thinking that confines you to small successes.” Especially in the current age of corporation layoffs, many consultants have to let go of the thinking, habits, language, and approaches that made them successful in corporate careers. “You grow based on exploiting strength, not acclimating to weaknesses,” writes Weiss. At the end of Part 1, Weiss includes his list of “10 Basic Principles of Million Dollar Consulting,” worth the price of the book alone. Weiss’s list includes such essentials as #1, “The consultant will improve the client’s condition,” #5, “Fees are based on the value of those outcomes as perceived by the client;” and #10, “No one becomes wealthy solely as a function of the revenues they generate. It’s not what you make. It’s what you keep.”

(Continued on page 19)
In Part 2 of his book, Weiss focuses on the tactics to implement a vision. He writes of the “octopus condition” – the networking tentacles required regardless of whether one is just starting out or has a backlog of business. Weiss claims he can “trace about 90 percent of [his] business to just four sources, and even they are interrelated.” (Italics are Weiss’s.)

Weiss’s book also discusses offering discounted fees. Yes, discounted fees. Weiss discovered that about 80 percent of his speaking engagement clients took advantage of his offer of a 10 percent fee discount if the client paid the entire speaking fee at the time of booking the event. He began to offer the same discount to his consulting clients; 75 percent of them took him up on his offer. This is not an opportunity to inflate your fees accordingly; the discount must be a legitimate one. The rewards are having money in hand, having no receivables or periodic billings, and having the client’s “full attention” to someone who has already been paid. Weiss’s methods flout the conventional wisdom that offering a discount can damage a consultant’s reputation or business.

Weiss believes that to grow a business, occasionally people will be needed, whether as employees, subcontractors, partners, alliances with other firms, or other innovative relationships. At the same time, he warns that “full-time people are full-time overhead,” and cautions against building a cast of thousands.

Weiss’s book addresses the non-traditional outlets for finding clients. Outlets beyond the corporate world include family-owned businesses, nonprofits, business-to-business companies, professional firms, and franchises.

Chapter 9 covers “How To Establish Your Fees”, a perennial topic among consultants and professionals. A lot of what Weiss writes isn’t surprising— the secret lies in actually doing what he suggests, which often means moving out of one’s comfort zone, sometimes a difficult task.

Part 3 of Weiss’s book covers “Success: Achieving Self-Realization.” Weiss leads the reader through managing capital, accelerating growth, getting clients to call you, accelerating renewal and repeat business, and knowing money is only a means to an end.

Whether or not you agree with all he has to say in his book, Weiss gives his answers to the enduring questions of consulting with straightforward language and good examples. Do yourself (and your business) a favor: beg, borrow, buy, or steal this book.

**Value-Based Fees: How to Charge—and Get—What You’re Worth**

by Alan Weiss (San Francisco: Jossey-Bass/Pfeiffer, 2002; ISBN 0-7879-5511-6; US$42.00, cloth)

Reviewed by Mary Anne Shew

Value-Based Fees is the third book in Weiss’s seven-book Ultimate Consultant series, and one that I often recommend when speaking at professional meetings.

Given the book’s hefty cover price, it is fair to expect a great deal from this book. Alan Weiss delivers. If you have read any of his other books, you will recognize in this one his signature style of humor blended with straight talk.

He lays the foundation in Chapter 1, “The Concept of Fees” (subtitled “Will People Actually Give Me Their Money for My Advice?”). The concepts presented in the first chapter will revolutionize your thinking about how to set your fees.

Weiss maintains that a consultant’s fee is based on perceived value and not on what has been done in the past, or how many hours worked, or deliverables provided. “Fees are dependent on value provided in the perception of the buyer,” he writes. Consultants often fail to establish a relationship with the legitimate, economic buyer, or to have the courage and belief system that support the high value to the client. Weiss asks, “if you don’t believe you are worth it, why should your clients?”

People believe they get what they pay for. Emotion makes them act, while logic only makes them think. Weiss labels these attitudes the Mercedes-Benz Syndrome. He suggests considering whether you are presenting an image consistent with the high value you offer: your materials, website, personal appearance, and demonstration of value. Weiss devotes Chapter 2 to describing the “lunacy” of the time and materials model to which we all fall prey. Chapter 3 teaches the basics of value-based fees such as focusing on outcomes, not inputs; the fallacy and subversive nature of “deliverables”; and measuring the unmeasurable.

Chapter 4 gets to the heart of the issue. “The fact that you could do something for less money, or that you could do more for the same amount of money, is irrelevant,” Weiss writes. So what is relevant to Weiss? Meeting the client’s objectives, improving the client’s condition, and delighting the buyer. But none of that is possible without trust as part of a relationship between the consultant and the client. Only then will the conceptual agreement be built: the business objectives to be met, the metrics or measures of success to assess progress, and the value to the client of meeting those objectives.

(Continued on page 20)
Of course, accomplishing these objectives is not so easy. But, Weiss posits, isn’t it just as difficult to follow a model in which the maximum amount one earns is based on the maximum number of hours one can work?

How does one take advantage of what Weiss teaches when one already has clients on board? It involves risk, scary risk: “Nothing raises fees like your willingness to walk away from business,” Weiss writes. He offers a checklist to help evaluate clients to see where they fall on the continuum between those who have “high potential for changing to value-based projects” and those who “will not change short of nuclear war.” Weiss recommends working with the former and, over time, letting go of the latter. Another of Weiss’s scary tenets: deliberately abandon the bottom 15 percent of one’s business at least every two years.

Chapter 6 compares value-based fees and retainers. Weiss defines retainers as compensation paid by the client representing access to the consultant and his or her talents for a specified interval. The chapter includes a list of the “Ten Criteria for Lucrative Retainer Agreement Conditions,” dealing with issues such as client access to the consultant, when payment is made, defining boundaries, and a clear renewal procedure.

Chapter 7 is where Weiss gets down to brass tacks: “Sixty Ways to Raise fees and/or Increase Profits Immediately.” Some are things one can do in the privacy of one’s own office (#6, “Practice Stating High Fees”; #7, “Think of the Fourth Sale First”; and #13, “Remove Fees from All Promotional Materials”). Others are done with the client (#9, “Engage the Client in the Diagnosis”, and #18, “Broaden Objectives as Appropriate to Increase Value”).

Weiss warns that clients won’t simply roll over and take all this from their consultants, especially when the clients are not used to dealing in terms of value. Chapter 8 arms the consultant with “How to Prevent and Rebut Fee Objections.” Weiss makes a very good point in the opening paragraph: You already know what all the possible objections to your fee are going to be. So be prepared for them.

Chapter 9 provides great ideas for non-consulting income opportunities among them, keynote speaking and book writing. Chapter 10 gives “Fee Progression Strategies” with a holistic view of fees and how to raise them.

Weiss closes the book with six, one-page appendices containing lists to help qualify the economic buyer, establish business objectives, and other topics with the goal of determining the value of the work to be done.

Bottom line: Do not buy this book if you are not truly dedicated to changing your approach to your business. If you are dedicated to change, the $42 book price will be repaid many times over.

Mary Anne Shew is the owner of ShewTech Associates (http://www.shewtech.com), an Internet consulting and web design firm in Rochester, NY.

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"WANTED" AUTHORS
for the next “Connections”
See the Footnotes column for details.
Member News

Mary Anne Shew, owner of ShewTech Associates (http://www.shewtech.com), an Internet consulting and Web design firm in Rochester, NY, was a nominee for the 2004 ATHENA Award sponsored by the Women’s Council of the Rochester Business Alliance. She was nominated by two colleagues from the Rochester Professional Consultants Alliance, which she currently serves as vice president. The ATHENA Award recognizes women of achievement in the community for their professional excellence, community service, and for actively and generously helping women attain professional excellent and leadership skills.


Amelia is also teaching a distance education course, Online Searching, as adjunct faculty http://slisweb.sjsu.edu/courses/244.kassel/244sp04gs.htm for San Jose State University, Graduate School of Library and Information Science during the Spring 2004 semester. She will teach Advanced Online Searching during Summer 2004 and basic Online Searching again in the Fall. qiiip

Vendor Relations Committee Report

The newest AIIP Vendor Discount Company is FPinfomart (http://www.fpinfomart.ca/), a leading aggregator of Canadian news, business information, and corporate data. FPinfomart contains over 200 full-text sources. For Canadian news, same day news is provided, and archival news since 1985 is available. To facilitate one-stop searching, the service also contains selected U.S. papers such as The New York Times. FPinfomart also contains 300,000 company records for Canadian businesses. Please log on to the Members Only section of the AIIP website for more information about the FPinfomart benefit, as well as a list of all current AIIP vendors.

—Jane John, Vendor Relations Committee, jjohn@onpointresearch.com qiiip

I-95ers

The I-95ers is a group of independent information professionals who live in the Maryland/Virginia/Washington DC area, or within driving distance of it. To join us, contact Karen Pecoraro at Karenpecoraro@jhu.edu. qiiip

CONNECTIONS
Advertising Rates

AIIP Connections is a quarterly publication with an average print run of 1,500, including prospective member packets and conference distribution. It is also available electronically via the AIIP website.

Basic rates for single color ads:

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For two color ads:

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Members in good standing receive a 50% discount on single color rates, but no discount on two color advertisements. Ads must be submitted in electronic copy. In addition, a copy of the ad must be faxed to Advertising Director, Eiko Shaul, at 416-544-0253. Any advertisement not submitted in electronic copy will be charged a one-time conversion fee of $40 per new ad. Ads must be received by the following deadlines: April 30 (for Vol. 18, no. 2), July 31 (for Vol. 18, no. 3), October 31 (for Vol. 18, no. 4), February 1, 2005 (for Vol. 18, no. 1).

Make checks payable to AIIP.

Mail checks to: Eiko Shaul, Shaull InfoResearch
209 Cranbrooke Ave., Toronto, ON, Canada M5M 1M8
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New FAQ on the AIIP Website

The AIIP Web Subcommittee is pleased to announce the publication of a new Frequently Asked Question (FAQ): “How did my colleagues in AIIP find their first clients.” Thanks to the terrific efforts of volunteers Shulamit Landesman, and Miranda Scott, wisdom gleaned with permission from AIIP-L member posts has been used to provide their best practices on important issues. The following AIIP members contributed information to the “First Client” FAQ: Amelia Kassel, Jan Knight, Chris McCutcheon, Michele McGinnis, Robin Neidorf, and Larry Ross.

Be sure to get familiar with this wonderful online AIIP member benefit as we have more FAQs that will be added!

— Luisa Tosi Claey’s, AIIP Web Coordinator, 2003–2004
— Mary Colette Wallace, AIIP ECC Chair & AIIP-List Coordinator, 2003–2004 qiiip
do that shameless, self-congratulatory cubicle dance.

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THE POWER TO LEAD CHANGE
This assignment looks at the history of computer development, which is often referred to in many reference books and is likened to the different generations of the computer they are central to. Each of these generations of computers is characterized by a major technological advancement that has fundamentally changed the way in which computers perform and operate, resulting in smaller, cheaper, more powerful and more efficient and reliable devices compared to their predecessors. Below I have tried to allude to this fact about the different generation of microprocessor development. A brief history of the device along with its functioning is described below. Working of a Microprocessor. It is the central processing unit (CPU) which coordinates all the functions of a computer.