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# Beyond Referral— Providing Business Reference Service in the Information Age

Coyla Barry

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Twenty years ago business information was transmitted by personal contacts with knowledgeable colleagues. Managers read *The Wall Street Journal* and a few trade magazines. Very rarely were business decisions based on systematically gathered facts and figures. Today's business environment is complex, global and fast-paced. To be competitive, businesses must now depend upon an incredible array of data, news, and published information to support strategic planning and day-to-day operations. Increasingly, business workers turn to the library or information centers in their company or in their community to supply the answers and background they need. In response to this increased demand, a super-market of information formats and products has developed over the last few years to facilitate access to the external economic environment. Many business reference librarians have developed their skills on the job or, one might say, by the seat of the pants. The result is an idiosyncratic mix of methods and resources that serves a particular user base. This paper describes some of the strategies and reference sources we have developed at the Burroughs Wellcome Company Library (the Technical Information Department) to provide company administrators the information they need to perform their jobs successfully.

Wellcome is an international pharmaceutical company with its headquarters in England and facilities around the world. The American subsidiary, Burroughs Wellcome Co., includes a major administrative and research complex at Research Triangle Park and a manufacturing plant in Greenville. The Company moved to North Carolina in 1970 from Tuckahoe, New York, and the research library was established in a modern building that includes both laboratories and corporate offices. In the 1970s the main users of the

library were chemists, microbiologists, toxicologists, pharmacologists and medical professionals who needed access to the scientific literature. The librarians who functioned as reference librarians and later as online search specialists, were expected to have a strong background in chemistry or the life sciences. We worked with the scientists to become familiar with their individual research, and our responsibilities included keeping up with the company's research projects as well as the journal literature and information technology.

In the 1980s several trends had a major impact on the pharmaceutical industry in general and on Burroughs Wellcome in particular. Companies were increasingly subject to government regulation; consumers became ever more knowledgeable about the side effects of drugs and new products; and competition for a profitable share of the international market demanded sophisticated analytical techniques and streamlined decision-making by company managers. Burroughs Wellcome changed from private to partially public ownership and suddenly found itself in the media spotlight as the first and, at this writing, only company to market an approved drug for AIDS. The library found itself called upon more and more frequently to answer business-related questions and conduct computer searches to find news stories, financial data, and background material for work-related needs at every corporate level. Although we had extensive experience functioning as a technical library in both collection and services, we had to find ways to support these business concerns while we continued to carry out our traditional duties for research and development.

Luckily, in most settings, solutions do not have to be found overnight. As it became apparent that the Technical Information Department needed to expand its collection and develop expertise to answer business-related questions, several strategies proved helpful.

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## Know your clients

Like most libraries, we keep logs of our reference questions, especially ones involving more than a quick look-up. Search statistics and keeping track of recurrent topics enable us to accumulate a profile of new user groups. Mr. Robert Kilgore, one of our search specialists, uses the opportunities of reference interviews not only to negotiate search requests but to become acquainted with new clients and the nature of their work-related tasks. Knowing *how* information is to be used measurably enhances the quality of the retrieval process and ensures that the information provided is targeted to appropriate goals.

Our business clients generally fall into several functional groups. With Burroughs Wellcome Company suddenly so prominent in the news as the manufacturer of Retrovir (AZT) for AIDS, public relations personnel need to follow media coverage of the company, AIDS research, consumer groups, and political news. The legal department requests texts of cases, law review articles, verification of citations, and updates on court decisions. No industry is more stringently regulated than the pharmaceutical industry. All areas of the company need to keep abreast of regulations as they appear in the Federal Register and of guidelines issued by the Food and Drug Administration and other government agencies. The recent changes in the tax laws have had an impact on all businesses; material on its substance and interpretation is needed by the financial and tax departments.

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## Every business reference service will be different depending upon the scope and thrust of corporate concerns.

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Analyzing the competition is an important function of many of our user groups. Information about companies—their balance sheets, subsidiaries, product lines, research expenditures, management biographies, new joint ventures, past sales figures, patents, trademarks, and SEC filings—is constantly in demand. Marketing and sales groups are always looking for articles about selling techniques, advertising, and new distribution methods such as mail order. Requests for demographic data, census figures, disease incidence, and special consumer groups are similarly frequent.

Another information need frequently encountered concerns computers. Almost everyone

in a business setting needs to evaluate and select new software and hardware. All aspects of data processing management from avoiding eyestrain to cost/benefit analysis is vigorously sought in the voluminous computer literature.

Once we started providing business information to such a variety of workers from top management on down, the volume of requests steadily increased. Repeat visits, long-term personal acquaintance, attending occasional staff meetings either to listen or give presentations about library services, energetic follow-up, and informal surveys to solicit feedback all proved useful in our "continuing education" efforts. At the same time, we were learning about many aspects of the pharmaceutical industry and Burroughs Wellcome Company beyond the technical and scientific areas to which we were accustomed. As a bonus, having new user groups and evolving our techniques to serve their needs added to the staff's sense of professional development, fostered creative approaches, and heightened awareness of the Technical Information Department's expertise and value in the conduct of corporate affairs.

## The Business Reference Collection

Even a modest reference collection contains certain standard items to provide quick answers to general questions. Our library always contained several almanacs, dictionaries, directories, encyclopedias, telephone books, the *Statistical Abstracts of the United States*, atlases, etc. for use by reference staff and personnel company-wide. This discussion will not list the small number of additional works we selected to support an expanded business reference service, but a few super-star sources will be mentioned as especially helpful. Among these are the *Corporate Technology Directory*, in four volumes, published by CorpTech, and *Nelson's Directory of Wall Street Research*, 1987, published by W.R. Nelson & Co.

While budgetary restraints may vary among institutions, certain guiding principles seem important and uniformly applicable. Only the most current editions of business directories and financial sources are kept in the collection. Such data are outdated very rapidly and wrong information is almost worse than none. (I'm sorry, Mr. NiceGuy has left the company. The Consumer Products Division? Sorry, it was dissolved after the merger with Big Conglomerate.) We maintain standing orders for these materials, and the collection is inventoried annually to make sure they are as up-to-date as possible.

## Business Periodicals

Besides the indispensable *Wall Street Journal*, the *New York Times*, *Fortune*, the *Harvard Business Review* and the *Economist*, business users consult a variety of publications the library receives as a result of corporate memberships in the American Management Association and the Conference Board. One of the most useful subscriptions we have added recently is *Economic Indicators*, issued monthly by the Joint Economic Committee of the Council of Economic Advisors, U.S. Government Printing Office. And, because Burroughs Wellcome's home office is in the United Kingdom, the library provides a daily subscription to the *Financial Times* (London).

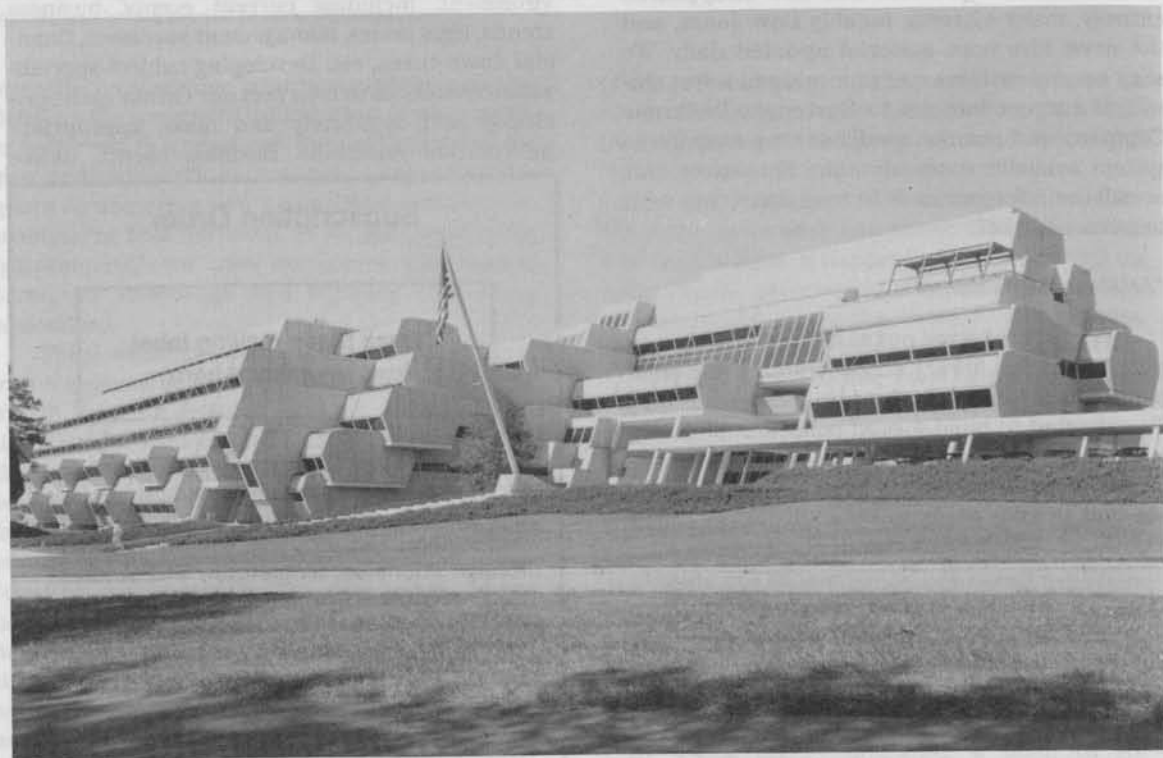
While the Technical Information Department receives over 1200 periodicals, most of these, in keeping with our R&D mission, are in scientific and technical disciplines. Rather than build an in-house collection of business materials, many company libraries such as ours fill requests for articles in business publications with copies from external sources. Burroughs Wellcome Company moved to the Research Triangle in part to be near the research centers and vast libraries of the area's three major universities. With such a variety of workers representing such a high degree of

specialization, it has been daunting to attempt to serve all needs. We have opted to obtain copies on demand rather than expand already stretched space limitations and technical services resources.

Since the early 1970s, the proliferation of financial, legal, business, and management databases has been impressive. Many periodicals and newspapers are available full-text from online vendors. Coverage is comprehensive, international in scope, or as local as the nearest county. Despite the absence of graphs and illustrations, online prints of an article's text will often provide enough content to satisfy an information seeker's request.

## Online Databases

The advantages of computer searching have astonished and delighted those of us who have lived through the period of online development, but the business reference specialist realizes that few busy managers are interested in searching or winnowing what they need from a long list of bibliographic citations. While computer retrieval can be exquisitely precise, it takes energy and experience to keep up with various retrieval techniques and, even more complex these days, to know



The Burroughs Wellcome Company, an international pharmaceutical company, is located in Research Triangle Park, North Carolina.



which of the many systems and databases to address for a particular need.

For help in analyzing potential databases for content and special features, the documents on online searching cited at the end of this article are extremely informative. Our experiences parallel those described almost identically: it takes a variety of systems and sources to satisfy clients in today's business environment. No one database vendor covers all the bases. Dow Jones News/Retrieval, Prompt, NEXIS and LEXIS, ABI/INFORM, INVESTEXT, Magazine Index, Pharmaceutical News Index, Dun & Bradstreet files, and the international news wires are the systems we use regularly. However, a week does not pass that new sources are not discovered and added to our "armamentarium." A recent success story was discovering daily exchange rates available historically on CompuServe. In an international company, workers need such data at many different levels, from reporting individual travel expenses after a trip to London to estimating sales figures based on the changes in the yen since the start of the fiscal year.

Besides the precision and comprehensiveness of online searching, many files are reliably and frequently updated. In the early years, searchers were often dismayed by the old data in business files. While this problem has not disappeared entirely, many systems, notably Dow Jones, and the news files have material updated daily. We scan several systems every morning to select stories of current interest to Burroughs Wellcome Company and put the headlines on a mainframe system available company-wide. Employees visit or call the reference desk to read items they wish to pursue further.

#### **"Attitude Adjustment"**

Many of us started out as reference librarians with traditional library school training and solid grounding in Winchell's *Guide to Reference Books*. We expected to build a good collection and help our users find whatever answers the books contained. A specialist serving business clients today has had to shift gears to take advantage of the wealth of information products and formats effectively. I would like to summarize the areas in which we and some of the business reference librarians we know have attempted to make changes to meet the often difficult and complex problems facing us in the information age.

First, knowing your users' individual needs helps to build a foundation upon which to develop expertise and plan resource acquisition.

Every business reference service will be different depending upon the scope and thrust of corporate concerns. Besides the pharmaceutical industry in the United States, Burroughs Wellcome Company follows business news in the United Kingdom where the firm's headquarters resides. A public library in a retirement community might focus on the stock market and individual tax preparation. A specialist in a biotechnology company might develop sources of venture capital and access to Japanese patents. A company or institution that has a business reference section that continually fine-tunes its sources and procedures by keeping track of its users' queries and where appropriate answers are found is saving time and money. This accumulated institutional memory is a valuable asset upon which companies in the future will capitalize and manage just as they do other assets.

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### **... we owe our users information based on knowledge and vigorous continuing education.**

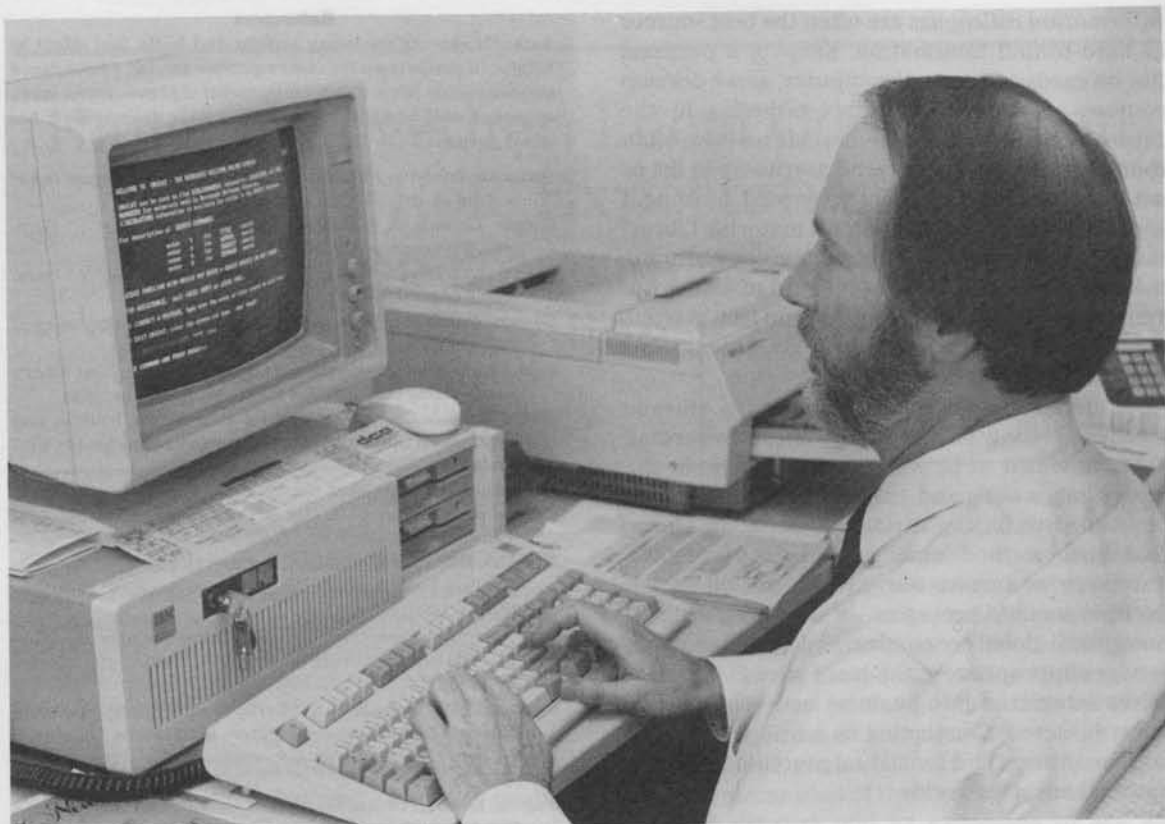
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Second, not only must we keep up with information technology, we must involve ourselves as deeply as possible in the external environment, including current events, business trends, legal issues, management successes, financial down-turns, etc. Developing subject specialization enables us to interpret our clients' questions clearly and accurately and make appropriate information selections. Business clients, unlike

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Mr. Robert Kilgore, business information specialist at the Burroughs Wellcome Company, searches a variety of online databases to provide timely data needed by company management.

scientific or academic information seekers, rarely dwell on the sources of information. If it's in print, or better yet, in a print-out, they will take what we give and, advisedly or not, may project a sales quota or acquire a new computer system on the strength of that retrieval. If we are going to be "gatekeepers," we owe our users information based on knowledge and vigorous continuing education.

Third, as librarians we must focus our thinking on costs vs. benefits and train our users to put a high value on relevant, current, solid information. Database searching fees keep increasing, but they save space, time, and money. One competent search specialist can accomplish faster and for far less outlay what companies traditionally paid several clipping services to do. The shelf space required for encyclopedias, directories, phone books, zip codes, dictionaries, journals, indexes, newspapers, etc. and the time spent browsing them are vastly reduced by external computer file access. Business information specialists and business information users will increasingly become colleagues in selecting appropriate ways to satisfy information needs. When the choices are laid out

(from a free do-it-yourself manual search, to an electronically produced bibliography, to a full-text computerized company financial report) and the costs are compared in terms of speed, currency, and relevance, most workers will opt for whatever saves time and effort. The costs of *not* tuning into what is happening, of *not* keeping up with trends, government regulations, the stock market, world news, the balance of payments, employee health care costs, etc., are incalculable.

Fourth and, I think, most important to an individual business reference specialist's success, is developing creative tactics when traditional methods fail. An integral feature of such methods is digging for experts and keeping track of personally tested sources from whom help has been obtained quickly and easily. Robert Berkman's *Find It Fast* gives a full discussion of his experiences and tried-and-true strategies for finding and interviewing such people. Book editors, journal article authors, convention speakers, association staffers, government information offices, agency spokespersons, the hands-on experts (the computer whiz, the professor, the environmental activist), local newspaper reporters, and *one's own*

information colleagues are often the best sources of hard-to-find information. Keeping a personal file, on cards or personal computer, as we develop sources ensures efficient fact-gathering in the future. For the price of a phone call, we have often found someone willing to send a write-up or list or set of guidelines free when we would have paid high prices for less authoritative material. Librarians are one of the best network groups around; asking for the information specialist at an institution is an almost foolproof way to get started. Honesty and persistence will go a long way toward turning up helpful leads.

Reference service in a competitive, diverse business setting is one of the most rewarding areas in which to be working these days. In the future, more skills and greater specialization will be needed to fill the various information niches that business and management needs require. The more we involve ourselves in our clientele's decision-making processes, in information technology and global economic trends, and tailor our services appropriately, the more we will find ourselves integrated into business activities as they are transacted, functioning as a bridge from the local institution and individual practitioner to the external business world.

## References

**Author's note:** Of the many articles and books that might be helpful in designing a business reference service, I have found the ones on this list to be especially useful. As I mentioned, every approach will be different; half the fun is discovering what works for you.

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