A SURVIVAL KIT FOR ACADEMIC CONSULTANTS OR
HOW TO KEEP USERS FROM STEALING YOUR JOB

SANDRA ROBINSON ST. GEORGE
DUSTY TEAF
The University of New Mexico

INTRODUCTION

Over the last year or so we have noticed a trend related to software users that has us worried. Some of you may have observed the same disturbing phenomenon. More and more frequently, we see that user services managers are looking inside the organization when recruiting support personnel. Naomi Karten comments that "...unlike the early days when recruitment from user departments was frowned upon by user management or prohibited by corporate fiat, most companies now permit or even encourage such moves..." (Karten, 1989, p.20). But, they are not looking in the user community for 'the cheerful biology teacher who knows spreadsheets.' (Karten, 1989, p.20) IC Managers are looking to recruit business savvy, technically topnotch, extremely service oriented individuals.

The worrisome thing is that today, there's a new breed of user in the 'user pool' that seems to fit that bill. They are more savvy, more sophisticated and, more visible and assertive about their skills than users have been in the past. It wasn't that long ago that well-rounded user support people were a scarce commodity. IC managers were anxious to hang on to whomever they got. But lately job openings draw many very qualified people and most of them are coming from a variety of backgrounds in the user community.

Take SAS® for instance, a few years ago our SAS users were a select group of computer programmer types, few if any of whom would have interest in working in an Information Center. Lately, however, we see SAS users popping up everywhere. SAS Institute is partly to blame of course. They're always coming up with more versatile software and easier ways of doing things. And then there's the SAS System for the PC. These days anybody and everybody is using SAS, and IC users don't seem as dependent on us gurus any more for secret tidbits of information. They're figuring out a lot of things on their own. Some of these users are beginning to look as good or better than we do.

Some of you seasoned SAS consultants are probably still lazing along, feeling fat and secure and complacent, but we are beginning to wonder if this new abundance of savvy users just might be threatening our once secure and cushy jobs. It seems like only yesterday when we SAS gurus were few and far between, and held all the cards? We knew all the secrets and we were in great demand. It used to be that you could sit in your office and wait for panicked users to come to you and throw themselves on your mercy. We were able to maintain our mystique by telling them we'd get back to them in a few days and they'd believe that it took that long. (Halliday, 1989, p.26) Those days are gone. The Information Age is encouraging users to get too involved in our business. It's getting harder and harder to preserve our image of software expert.

Many people believe that customer service has been going downhill in the U.S. for years. As we begin the 90's in the consulting field we need to find ways to better satisfy our clients through exceptional customer service. Dan Roberts in a recent issue of Information Center magazine (Roberts, 1989, p.22) says that the only way for IC's and the consultants within them to position themselves for the 90's is through better than ever service to our customers. He believes that 'Developing an effective approach to customer service will mean the difference between survival and failure.' (Roberts, 1989, p.18)

So, along these lines, we would like to share with you our survival kit for IC Consultants and tips for how to keep users from stealing our jobs.

CONSULTANTS' SURVIVAL KIT

1. Know Your Resources and Exploit Them

The more information we have as consultants, the better we can do our jobs. Information is a major resource. As consultants we must learn how to amass a great deal of material and information and then organize it so that we can find it instantly...so that it is always at our finger tips when we need it.

Most of us already recognize the importance of information as a resource, but often we fail to recognize that a major source of this resource is people, and specifically our users. We must treat them as the valuable resource they are. In our jobs giving knowledge is not a one way street. We need to develop a relationship with our customers that permits us to exploit and
employ their storage bins of knowledge with their blessing.

With this in mind, it is important for us to know who our key users are, know who has the expertise and who we can employ as information givers. We need to build a network of contacts and exploit them. We need to call on and plug in to our key users regularly, perhaps weekly, and through them keep ourselves up to date. We need to utilize our user resources in a systematic manner even though not necessarily in a formal atmosphere.

F.J. Purcell (IC, 1989, p.24) suggests that to "...use people is not evil; after all 'use' is a synonym of 'employ'. The ability to 'use tact and diplomacy to get the most from people' is a legitimate business tool. Purcell is not suggesting that we take unfair advantage of others and their knowledge, but that we utilize what they have to share and be receptive to what we can learn from them. He suggests that '...you know what certain people excel in and what others are poor at. Keep these traits in mind, catalogued and cross-referenced for easy access. Think of all the people with whom you work and what they are capable of; play to their strengths and help them overcome their weaknesses.' (Purcell, 1989, p.24)

As Purcell says, 'using tact and diplomacy to get the most from people won't be found on any software yet written. It might well be, someday, but for now identifying people and their skills, and using tact and diplomacy to get the most out of them, are important tools..." (Purcell, 1989, p.24)

Surveys are also a great source of information. From them we have been able to develop mailing lists, lists of experts, lists of applications and projects being developed etc. They can be a map or directory to who knows what, and who is doing what, and from this information we can begin exploiting our users profitably.

Carolyn Mullins says to employ our users in many aspects of our business, including training. By seeking experts from departments outside the IC you broaden your professional network, learn more about what other departments do which may help you target support efforts more precisely, and flatter the experts whom you recruit, while containing overall training costs. Your recognition of their value may also make them your strongest allies in the future." (Mullins, 1989, p.18) Mullins sees this approach as job insurance. 'If for no other reason, view this new training approach as protecting your budget, your job and your department' She says that ultimately this approach, and your new allies, assures your position as an integral part of your company's business. (Mullins, 1989, p.18)

We can further employ them in seminars and workshops, in evaluation of products, in writing newsletter articles and in our daily routines...but we should brag about them and their expertise to others and they in turn do not mind a bit that we're exploiting their knowledge...in fact most are flattered and many love it.

So, rule number 1 is Exploit your Resources...especially your users.

2. Listen and Learn and Share

To enlist your customers as a resource, you will need to gain their confidence and interest. One way to do this is to truly listen to them. Be interested in what they do and how they use your services. Making an effort to really hear your clients may open doors to new opportunities you would have missed otherwise.

Listen not only in your office but out in the customer community. Listen to them in their own environment. Get to know their business needs close up. As Naomi Karten points out, the users 'know their problems better than anyone else' (Karten, 1989, p.19) Let the user guide us and also use the IC as a sounding board for problems or for new ideas. The IC professional must be sensitive to the messages being sent out at all levels.

Tom Peters says we must be open to listening to complaints as well as praise and small talk. We must deal with complaints immediately. We must never let users think their concerns go in one ear and out the other, or feel that they are getting the runaround. Peters warns that we must watch out for 'talking with customers but not really listening.' and also to make sure that we're not just listening to our 'loyal' customers, because they may not always be our lead users. (Peters, 1983, p.8)

Listening is an important component of being a good communicator. Through listening we learn how to respond. We become trusted advisors, instead of just casual problem solvers. By being good listeners we can enlist the users as allies and as friends. Peters says, 'Listen to what is needed, what is new, and what is dreamed.' (Peters, 1983, p.8)

We must train ourselves to be not just collectors of information, but rather teach ourselves to learn from it. Much of the responsibility for achieving this goal is on us. There is no magic formula that will instantly turn us into computer literate, personable, knowledgeable, service oriented professionals. We have to train ourselves to be pros. We have to learn what is necessary to perform that role.
Naomi Kartin (IC,1989,p.20) believes that 'IC pros cannot wait for their management to guide their growth... they have to take it upon themselves to gain this edge. We can seek out new information from our colleagues and from our management. Go to meetings, to seminars to workshops and to demonstrations, not just with the idea of getting out of the office for awhile, but with an open mind ready to learn all you can. The more you learn and know the more secure and confident you can feel. As Debra Malina tells us, '...there are two schools of thought on the depth of knowledge necessary. One says you can't possibly know everything, and you don't have to........The other school insists that a jack-of-all-trades can be a master of all.' Her point however, is that 'Regardless of the depth of the knowledge,.......the expansion of breadth is clear to both schools.' IC professionals '......need to do three things: they need to learn, they need to learn, and they need to learn.' (Malina, 1989,p.13)

It is also, becoming very important these days for all computing professionals to learn as much about their business as they can. This does not mean just the business of computing, but the company or organization itself. What are its purposes, its goals and objectives. What makes your business and that of your users tick. Computers are becoming more and more important to the overall strategic systems of organizations. We need to be a part of that. Ask lots of questions; read related business journals as well as computer magazines and take the time to understand them. Truly understanding the business of the organization you work for will give you an advantage in helping to plot your organization's future.

Finally, do not be afraid to educate your users. Help them to become independent in their computing skills but at the same time dependent on you not just for programming information, but for advice on how they should be integrating your computer services into successfully carrying out their own jobs. Their becoming knowledgeable does not necessarily pose a threat to you. Lighten your burden by sharing the wealth and then wait for all the rewards that will come back for you when they begin sharing new discoveries of their own. It's got to make you look good, because they are learning from you. The more you have to offer and the more willing you are to share what you have, the more valuable you will become to your users and to your organization. You can teach an old dog new tricks. Even we, are not too old or set in our ways to learn.

3. Offer Exceptional Service

Tom Peters believes that the only organizations that are going to make it in the 90's will be those that gain the competitive edge by providing exceptional service to their customers. He suggests that we develop a 'passion for our customers'. (Peters,1987) Become people persons of the highest order. Train ourselves to be upbeat, enthusiastic and innovative in our jobs. People come to us because they need assistance. We cannot be exceptional consultants if we run our area as though it was a typical service desk in a car dealership or retail store, giving out information as we please, and if we please.

As Dan Robert suggests, Think about '...the last time you went out to dinner, took your car in for repairs or asked a question in a retail store. Most likely you were rushed, given the runaround or treated as if you were a nuisance.' (Roberts,1989,p.18) We have to ask ourselves if we're guilty of treating our users the same way. If we are, we're putting ourselves at risk. That brand of service is nothing special. Customers can find it anywhere.

In our competitive line of work we can no longer afford to have customers going away mad, most likely looking for a departmental guru to assist them, who quite frankly might wind up replacing us somewhere down the line. These days, we must provide the kind of service that elicits big tips and great recommendations. We need to establish solid reputations for exceptional service. Ask yourself, does it cost more to offer excellent service? Is it harder to be courteous or is productivity lost in providing good service? Probably the answer for most of us is no. But even if better service does cost us more, it's worth it. More often, good service is cheap and providing it is easy, plus it makes us look great while we're safeguarding our jobs.

We can begin improving service by thinking of the small things we can do to make life easier for our customers. For instance, let key users know when you'll be away and who they can go to for assistance while you're gone. Always make your users feel important and that you are concerned about their problems. Always get back to them if you say you will. Even if you can't solve their problem, let them know you are exhausting all your resources in trying to do so. When they come in, don't make them feel that you are saying 'Oh no, not her again? It's really the 'user from hell'. When the clients feel appreciated so will you. We have many former problem users who have turned out to be some of our most loyal supporters.

For years Tom Peters has been urging us to make sure that the little things get done superbly. 'Doing the big things right is critical....but the little things very often make the big difference. Have phones answered promptly, courteously and knowledgeably. Make correspondence to customers clear, simple and interesting. Make everything that is seen, heard or used by the customer as ' user friendly' as possible. Say thank you in a thousand little ways. Go at least one step beyond what is adequate. Stretch toward the customer.' (Peters,1983)
Stretching toward the customers may mean handholding them through change. This could mean providing calls or mailouts to users about changes and offering assistance in getting through it. You may even want to call some of your clients and assure them that the change is necessary and tell them why. Let them know that your organization would not introduce changes unless they were absolutely necessary. Give them assurances and perhaps alternative ways of doing things, and above all let them know you’re there for them until they feel comfortable.

Peters feels that good service is memorable. It means that you must do a thousand things well. 'Attention to myriad small details determines the difference between satisfied and irritated customers. This translates into delivering what is promised and more, even if it requires 'over-extendign' to do so.' (Peters, 1983) Satisfied and appreciative customers are the most important components of a consultants' survival kit. Peters strongly believes that, 'The fact that service is going downhill in our profession could be our biggest opportunity.' (Peters, 1983) He has been urging us throughout the 1980’s to take up this challenge. Now is the time to seize this opportunity. We can’t afford to miss it.

4. Stay Visible

Be very visible in a positive way. Reach out to your users. Don’t make them always come looking for you. Make sure your customers know who you are. Put yourself in front of them often. Market yourself by phone, in writing or in person. Be the first to inform them of what your organization is doing. It will make them feel important. Share your successes with them and theirs with others. Introduce them to other staff that can also assist them without their having to ask. Seek them out to share useful information with them. Don’t go after the short term glory, but rather look for support in long-term relationships.

Be in control of their image of you. Shape it yourself. Always let them see you in a professional light. Never run down other clients, managers, organizations etc. in front of users. You don’t want them to think you’ll discuss them in the same way as soon as they leave.

Apply the 80/20 rule. Give your most to the customers who provide you the highest return on your investment. That does not mean that you can ignore the others... it does mean you must identify your key 20% and give them 80% of your time. (Roberts, 1989, p.22)

Being very visible also means that your appearance is important. Mary Sommer says it is important for IC pros to keep up their appearance at all times because IC staffers are never quite sure who they’ll run into from one minute to the next. You can be helping a clerk in one place and thirty minutes later you’re in the executive suite helping fix a vice president’s pc. (Sommer, 1989, p.26) Karten believes that the IC professionals that succeed in the 90’s are those who will be ‘aggressively seeking out high visibility opportunities where they can make a big splash and produce a visible gain.’ (Karten, 1989, p.19)

5. Be Creative And Innovative

Design your own unique brand of customer service. Go beyond the obvious. Try new things to get the information out. Provide alternative training techniques. Use tutorials, videos and hands-on workshops. Provide a library of demo disks for new products. Connect users and vendors for new product demonstrations. Develop presentations comparing products, and slide shows to supplement your training materials.

Become a positive communicator. Emphasize your writing and verbal skills over technical ones. Learn to speak many languages. You must be a linguist in a new sense of the word. As Malina (1989, p.15) suggests, you must learn to consult in a variety of languages 'from accounting to research, to clerical, to sales, to strategy.

In Towards Excellence, Tom Peters says, 'Listening to customers is the key to unlocking the secrets of innovation. Customers often can provide new product and service ideas.' He urges us to take the lead from our users. Let them lead us to what is needed. We have to go beyond contempt for the nonexpert. We need to question users for new ideas and improvements and then test ideas on them. Have them evaluate and participate in experiments with new devices, software, training techniques etc. (Peters, 1983)

6. Be Resilient

Train yourself to bounce back. Use adversity and change as positive learning experiences. The 90’s consultant must be ‘...articulate, politically astute and able to survive and thrive in an environment of constant change.’ (Karten, 1989, p.20)

Stay cool under pressure. Take your time in making decisions. Admit mistakes and learn from them. Turn mistakes around to your advantage and always be aware of alternatives. Though you are pulled and pushed in a thousand directions, remain steadfast in your objectives and nurture your survival skills at every opportunity.
Be extremely flexible. Gain as many new skills as possible. Never stagnate. Never assume business as usual. Mary Sommer says 'The more skills, the more valuable a person becomes; obviously the better his or her career path will be.' (Sommer, 1989, p.36)

Hone your political and diplomatic skills. Become a good will ambassador for the IC. You must be able to balance the needs of everyone from top management to computer center personnel to the end user. Jerry Kanter of Babson College calls the successful IC professionals 'Straddlers' and 'Tweeners'. These are people who can balance well between worlds. He says that if balancing acts make you nervous and you can't see this type of thing as a positive adventure, then don't expect to survive in the Information Center of the 90's. (Malina, 1989, p.16)

Mary Sommer says of IC professionals, 'After years of juggling diverse personalities, project requests, and deadlines'...they 'could easily move to the U.S. State Department for a new careers as foreign diplomats.' (Sommer, 1989, p.25)

In conclusion, we'd like to emphasize that it is no longer enough just to be an expert in SAS. We must work at being Renaissance support professionals as well. As Rosemary Battles says, 'A good definition of customer service success is consistently meeting and, at every opportunity, exceeding customer needs'. (Battle, 1989, p.8) As Jacque Passino of Andersen Consulting points out, IC professionals '...need to understand that they can't just bring one skill to the job; they need to be multidimensional.' (Sommer, 1989, p.26) IC Executives are concerned with finding and keeping people with just the right combination of skills, technical expertise, people know-how, and savvy in respect to the business.

To be viable in our profession, from now on, there is no such thing as spare time. We must keep ourselves busy and always on the forefront of information flow. We have to be listening and learning, exploiting and utilizing, marketing ourselves, meeting the challenges of change and striving to provide extraordinary service to our users at all times. If there is such a thing as Superconsultant this is who we must become. Tom Peters is right on when he says, your job may depend on your being an exceptional consultant, which 'means having a bone-deep belief in the importance of customers that is translated each day into thousands of small customer focused activities. The notion of customer satisfaction is hardly a new one. People talk about it all of the time. The stark reality, though, is that it is one of the most astonishingly and universally underpracticed values in business today.' (Peters, 1983)

SAS is a registered trademark of SAS Institute, Inc., Cary, NC.

REFERENCES


Halliday, Caroline, 'How Not to Survive the Information Avalanche', Information Center, 5/89, Vol.V., No.5

Karten, Naomi, 'On Becoming Business Oriented', Information Center, 4/89, Vol.V, No.4

Malina, Debra, 'The Renaissance Manager', Information Center, 4/89, Vol.V, No.4


Peters, Thomas, A Passion For Customers, Video Publishing House Inc., 1987

Purcell, F.J., 'Tools of the Trade', Information Center, 4/89, Vol.V, No.4

Roberts, Dan, 'Customer Service, Information Center 'Style', Information Center, 8/89, Vol.V, No.8

Sommer, Mary, 'Good Will Ambassadors', Information Center, 4/89, Vol.V, No.4


Presentation Cartoons:

Information Center Magazine (1989)
OMNI Magazine (1982-1989)
The New Mexico Daily Lobo (1990)
Data Center (1988)
Data Training (1989)

FOR MORE INFORMATION

Sandra R. St. George or Dusty Teaf
CIRT Information Resource Center
University of New Mexico
2701 Campus Blvd. NE
Albuquerque, New Mexico 87131