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Educating the C-People: Engage Your Decision Makers and Help Them Evolve

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EDUCATING THE C-PEOPLE: ENGAGE YOUR DECISION MAKERS AND HELP THEM EVOLVE

reviewed by Michele Lucero, Thomson Reuters, Los Angeles, CA

Coordinator and Speaker: Monice M. Kaczorowski, Neal, Gerber & Eisenberg LLP

Moderator: Gayle Lynn-Nelson, LexisNexis

Speaker: Cheryl Niemeier, Bose McKinney & Evans LLP

Speaker: Deborah S. Panella, Cravath, Swaine & Moore LLP

Speaker: Holly Pinto, Holland & Hart LLP

This program focused on tips, techniques, and suggestions to understand, educate, communicate, and negotiate with the C folks in your firm. It is important for librarians to prove their worth in their organization by leveraging their assets and expertise. Several questions were proposed to the panel of experts. Each gave their own insight as to what they have done to address the question in their firm. The C levels are anyone within your organization with a C level title (i.e., CEO, CFO, COO, and CMO). Below are a summary of responses to the questions proposed to the panel.

If you are not currently a C-person, how can you become one and have the courage, control, and expertise to be in a peer-to-peer relationship with other C-people in your organization?

Monice recommended starting small and identifying the correct C person that you need to speak with based on what you are trying to achieve. If you are interested in cost recovery, you would probably want to speak with the CFO. You want to align with the C level that holds the power. Secondly, Monice suggested educating the C persons. We need to communicate to them and be proactive. We need to understand their role and how it can impact your library.

What C person in your organization has been successful and how can you emulate what they have done?

Debbie said that all C persons have something to offer. For example, the CIO at Cravath has high energy, is a good speaker, motivational, a good listener, and holds to his promises. The CMO has helped figure out how to share and is concerned with the firm going forward. Monice mentioned that the CFO at her prior firm reassessed billables and cost recovery. He made Monice part of the process with the billing, revenues, cost of new associates, and real estate space. Most important, Monice learned that if she could justify staff, she could get additional personnel. Cheryl mentioned that her COO was a supporter; the glue that holds the firm together. In summary, the success has been through extraordinary leaders seeing the big picture and moving quickly with decisions. Having trust, respect, and communicating with employees has led to victory.

Have you considered the C person's perspective? How does a C person think?

Holly considered that this must be a difficult position. The C person probably doesn't think much about the library; rather it is important to speak the C person's language (cost benefit analysis and economical impact). It is beneficial to know where they are coming from in order to know how to proceed if you need something for the library. Monice suggested looking at the big picture. Look at what are they reading, set up alerts, and have your elevator conversations ready. The C people are intrigued when you show interest in them. This is also another way to market the library.

What or who are the biggest obstacles or roadblocks you have faced in being successful? If you have conquered them, how have you done it?

For Cheryl, the biggest obstacle has been additional staff for the library. They have been successful thus far with four interns, but not yet with adding a full time additional staff person. You have to be unafraid to ask for what you need, communicate clearly with the C person, take risks, and be creative in obtaining what you need. Debbie mentioned her biggest roadblocks have been getting past the stereotype of the librarian and the burden of daily responsibilities. Librarians need to look at life from the C level's perspective and anticipate their questions. We need to make a commitment to go beyond the day-to-day activities and have a strategy in place.

Who has helped you along the way, inside and outside your organization? Who has served as a mentor? What outside organizations, memberships, education courses have helped you?

For Holly, she was promoted without managerial experience. She sought out internal colleagues who proved invaluable when it came to working on the budget. She also developed relationships with external colleagues that helped with her growth as a professional librarian. Professional associations and activities such as AALL, West Advisory Board, and AMPLL provide for networking and participation with other colleagues. Cheryl said that other firm librarians and those she met through local library associations helped her. Debbie also suggested joining and becoming active with other organizations such as ILTA. In summary, it is important to network and get involved at all association levels, be a mentor for others, and take advantage of vendor activities. We need to get out of our comfort zones and participate with other associations as well.

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NUTS AND BOLTS OF CI – DELIVERABLES

reviewed by Riva Laughlin, Haynes & Boone, LLP, Houston, TX

Frank Lee, Paul Morton, J.O. Wallace, Jr., and Cindy Shamel discussed what to do with CI information once you've gathered it. A little of this information was repeated from the earlier CI program, but it was worth hearing twice.

- From Cindy Shamel (Shamel Information Services)
 - Deliver answers – Don't just provide a data dump.
 - Organize the information – MS Word can create a TOC. Use article titles as sub-headings.
 - Summarize – No one wants to read everything. Create a summary sheet with the high points listed.
 - Visualize – Use charts, tables, and graphs where possible.
 - Standardize – Brand **everything** that comes from the library.
- From Paul Morton (Southern California Edison)
 - Business decisions are based on

information gathered and analyzed – not on instinct.

- Know who the ultimate customer is.
 - Ask how, when, and why the report is needed.
- From J. O. Wallace, Jr. and Frank Lee (Latham & Watkins)
 - Create a template/checklist for each request.
 - Include information on other work done by the firm and who knows whom.
 - Include a conflicts report.

Librarians, as a profession, are good at gathering information. Many of us are not as good at presenting that information in an organized format. This program pointed out some of the ways information can, and should, be presented. I was especially taken by the idea of including information from within the firm. This is something that should be automatic, but is frequently overlooked.

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What mistakes have you made along the way and how have you corrected them?

Debbie pointed out that librarians often undervalue themselves and their services. Sometimes we underbill our time and we do not fight for correct billing rates. We should all keep a private journal of our successes and not promise too much. We need to also manage our time and priorities.

What are the topics you should discuss with the C People in your organization?

Cheryl recommended staying on top of what the C people are reading. Place your name on the routing list, read it first, then route it. This way you will stay informed and be able to discuss these topics with the C people. We need to be proactive and bring problems as potential solutions to the C level. Holly suggested alerting the C people early, so there aren't any surprises. For example, alert them of price increases and cost recovery concerns. Attend vendor events where C people often attend and visit your regional offices for exposure. In summary, you want to speak their language and do your research to learn what the C people want.

Is the C Level in your organization where you want to be? Now that you are there, what price do you pay? Will there be increased stress, increased hours, increased demands and expectations?

The C level is not a decision to be taken lightly. Monice suggests thinking about if this is a career direction you want

to take. It will involve more responsibilities and you will still need to run the library. It is a whole different ballgame and you will be expected to work longer hours. It is a position that will influence your current lifestyle.

How have you shown your successes to the C people in your organization and why is it important?

Cheryl said don't be afraid to speak up. While downsizing their library, she donated books to a new magnet school and was featured in the newspaper for this great offer. The firm was notified and she was given recognition across the firm. Often the librarians that are silent are the ones that really get what they want. Holly said it is important to inform the C people of your successes because otherwise they may not know what an asset you are to the success of the firm.

In summary, this program was extremely useful because it offered real-life suggestions on how to develop a relationship with the C people to help the library and firm succeed together. Educating the C people involves helping both yourself and them evolve. Sometimes we are afraid to ask for what we need, do not market ourselves and the library enough, or simply don't have the time to interact with the C level. It is critical to develop relationships with the C people because they make the decisions for your firm and influence your library.