

Optimize Research Spending

Evaluating for Strategic Resource Purchases



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Library & Knowledge
Information Systems

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What are your biggest challenges?

- Address limited capacity
- Free up mental space to be more strategic and proactive
- Move towards higher-value activities
- Not sure - we just know we need to be more efficient

Agenda

- What do you want to accomplish and why?
- Define the value proposition
- Jump start the process / design thinking
- Define the resource management lifecycle
- Define the problem to be solved
- Key ingredients & takeaways
- Putting the plan into action
- Continuous improvement
- Questions

What do you want to accomplish?

Too many resources, innovations, terms, renewal deadlines, and NEVER enough time!



Why optimize? Why is it important?



Work ON the business
Not IN the business

The work of managing and optimizing your department is not secondary to customer service; it's the engine that drives your ability to deliver increasing value to your customer over time.



Value Proposition: Research Optimization



Image by skeeze from Pixabay

Engage to better understand workflows, research and analytics needs
Analyze outreach findings (qualitative) and usage data (quantitative)
Make strategic purchasing decisions for best suite of resources

Jump starting the process with Jinfo



What are we trying to achieve?



Address limited
capacity



Free up mental space -
strategic and proactive

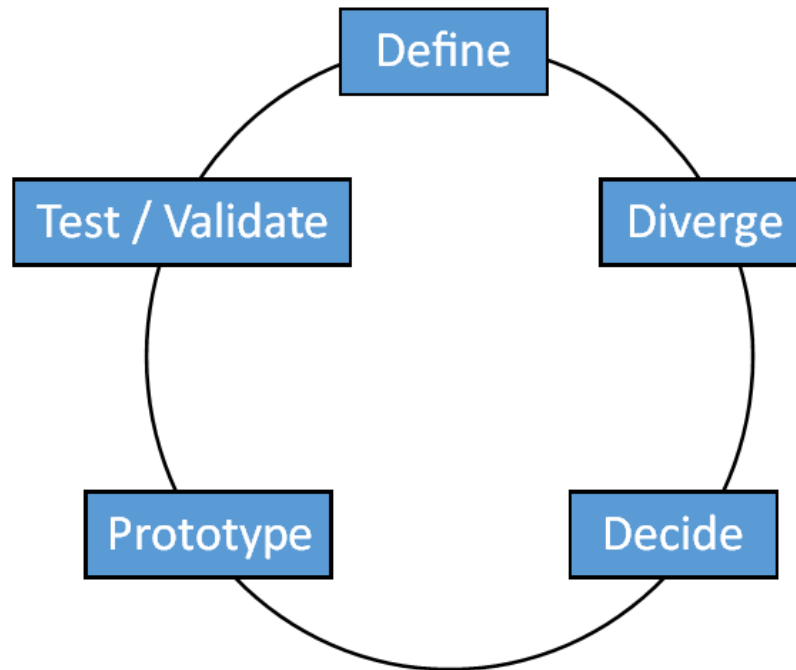


Plan for the future

Design Sprint Thinking

Allows us to learn fast and without the high cost of commitment

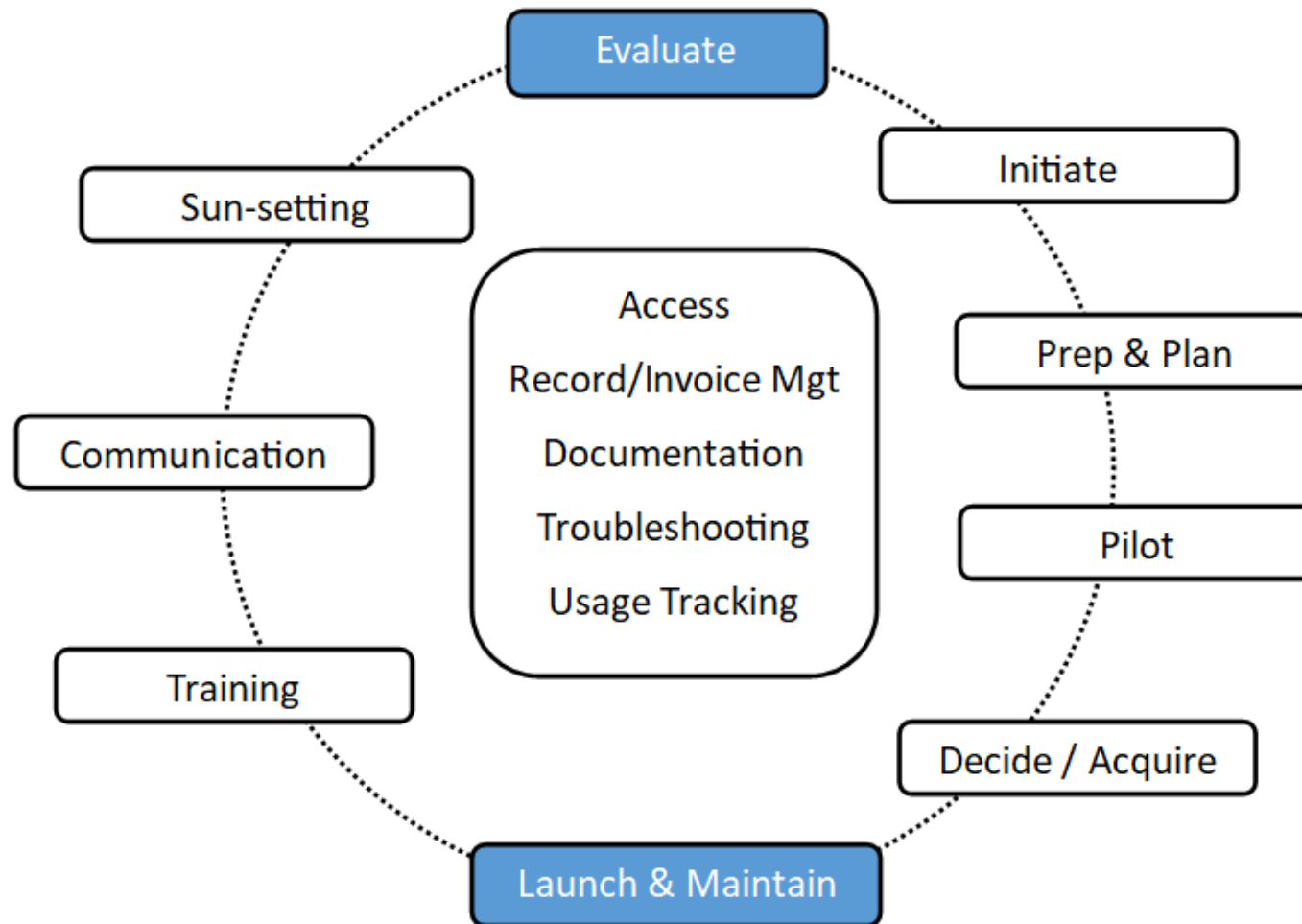
Sprint is broken down into these steps typically are spread over 3-5 days



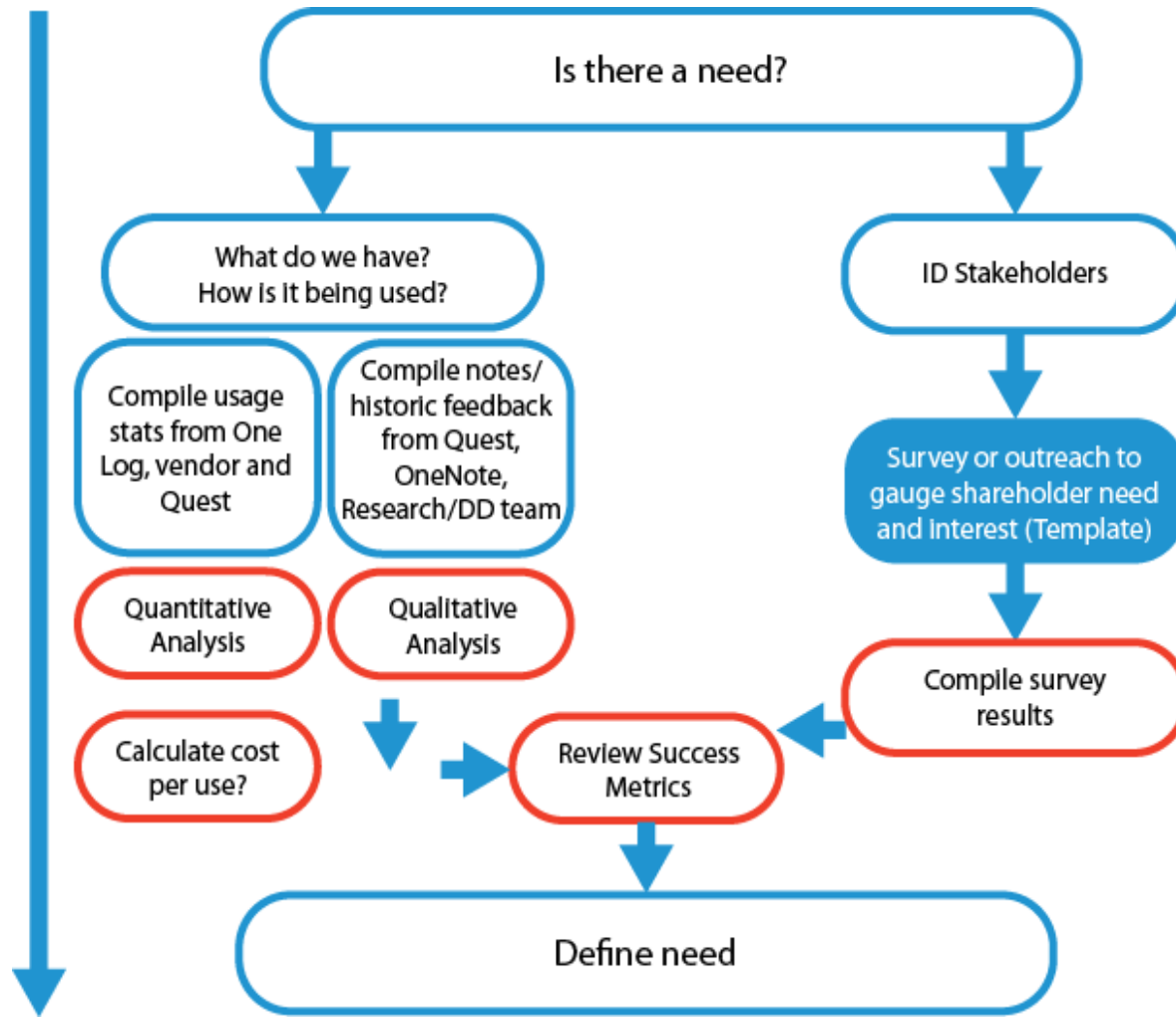
Design Sprint Roles

- **Facilitator** keeps the group moving
- **Decider** makes final decision if disagreement
- Information Professional
- Legal Expert
- Content Expert
- Tech Expert

Defining the Resource Lifecycle



Define the problem to be solved

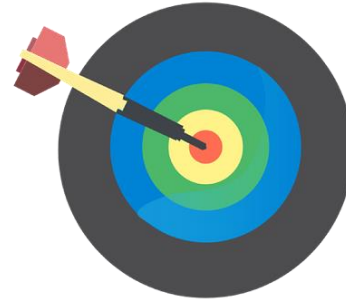


Key Pieces of a Successful Pilot

- Evaluation matrix
- Introduce to key influencers
- Identify pilot users
- Draft sample searches / test tasks
- Tap research analyst expertise
- Survey + direct outreach
- Outreach to peer organizations
- Create user “personas”



Key Takeaways



WHAT WORKED

Chance to opt in

Outreach via IM

One-on-one follow up with demos & key questions

Partnering with other teams

Best Practices for Vendor Partnerships

WHAT DIDN'T

Not finalizing participant list for first evaluation

Experience doesn't trump leadership

Putting the Plan into Action

The screenshot displays the Wrike project management interface. The left sidebar shows a project hierarchy with 'RESEARCH OPTIMIZATION' selected. The main workspace is divided into two panels. The left panel shows a task list for 'AI Research Evaluation' with columns for 'List', 'Board', 'Table', 'Gantt Chart', 'Files', 'Stream', 'Timelog', and 'Workload'. The task list is filtered by 'All active tasks' and shows a list of tasks including 'Complete Current Resource Usage Report' (Active), '4: Decide - Acquire' (Not Started), and '3: Pilot / Evaluate' (Active). The right panel shows a detailed view of the '3: Pilot / Evaluate' task, which is a subtask of 'AI Research Evaluation'. It includes a checklist of tasks with completion dates and status, such as 'Access Setup Checklist' (Completed), 'Onelog Access Checklist' (Completed), 'Schedule Pilot Kick-off checklist' (Completed), 'Evaluation' (Completed), 'Complete Function & Content Evaluation Matrix for li...' (Completed), 'Draft and send reminder to pilot participants t...' (Completed), 'Collect and finalize responses to AI Tools Survey' (Completed), 'Usage' (Completed), and 'Survey' (Active). The interface also shows a search bar, a user profile, and various navigation icons.

Wrike Project Management Interface

Left Panel: Task List

- Project: RESEARCH OPTIMIZATION
- Task: AI Research Evaluation
- View: List
- Filter: All active tasks
- Sort: By Status
- Task List:

 - ACTIVE (1)
 - Complete Current Resource Usage Report (Active)
 - NOT STARTED (1)
 - 4: Decide - Acquire (Not Started)
 - ACTIVE (2)
 - 2: Prepare and Plan (Active)
 - 3: Pilot / Evaluate (Active)

Right Panel: Task Detail View

3: Pilot / Evaluate

AI Research Evaluation +

Active | Chad R. | #376999314 by Chad R. on Jul 22, 2019

Set Date | Approvals | 0:00 • 0:00 | 6 subtasks | Attach files | 9

- Access Setup Checklist (Completed)
- Onelog Access Checklist (Completed, Apr 8)
- Schedule Pilot Kick-off checklist (Completed, Apr 13)
- Evaluation (Completed)
 - Complete Function & Content Evaluation Matrix for li... (Completed)
 - Draft and send reminder to pilot participants t... (Completed, Apr 17)
 - Collect and finalize responses to AI Tools Survey (Completed, May 8)
- Usage (Completed, Apr 27)
- Survey (Active)

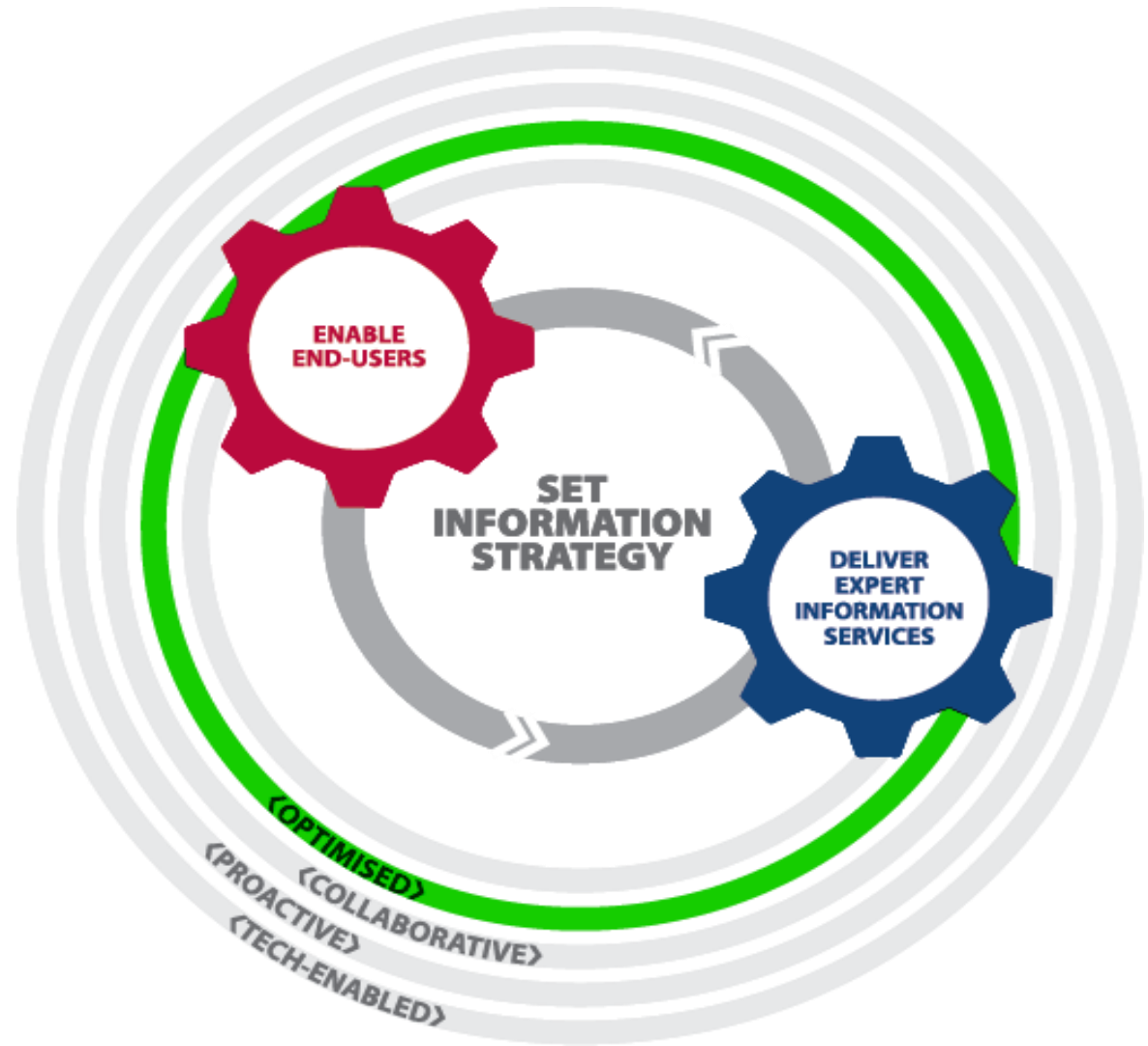
Add a comment...

Continuous Improvement

Optimization isn't a project or something you do.

It's **HOW** you function as a department.

It's how you think.



Thank You & Questions



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