

MAKING SENSE OF BUSINESS REFERENCE

A Guide for Librarians and
Research Professionals

SECOND EDITION

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PREFACE/UPDATED INTRODUCTION

THE PREFACE OF THE ORIGINAL edition of *Making Sense of Business Reference* began, “No one is safe from business reference.” This still holds true—and then some—over half a decade later. Bizref questions haven’t gone away, nor has business information made itself any more readily available. Enter this updated edition of *Making Sense of Business Reference* to the rescue!

A LITTLE BIT ABOUT THE BOOK AND THE AUTHOR

The description of the original *Making Sense* is still apropos: this book is your bizref friend. If bookstores or libraries had a bizref self-help section, this book would be in it. Depending on your background, this book will serve as a bizref primer, bizref therapy guide, bizref refresher course, or some combination of all three. Welcome to *Making Sense of Business Reference*, one and all!

I’ve always considered myself an “accidental” business librarian and still do, even after more than twenty years in this profession. I’ll reframe that description, though, to now use the term *serendipitous* business librarian, since these past twenty years have been a happy and fun-filled ride. I never could have predicted the amazing response the first edition of *Making Sense* received. I felt like a bizref rock star as readers approached me at conferences or e-mailed me to tell me how *Making Sense* had helped them. Someone once told me that they’d read it on the plane on the way to a job interview and were convinced it was what led to their successful offer of a business librarian position. And it warms my bizref heart to see *Making Sense* recommended to new librarians by old (I mean seasoned) librarians, many of whom I consider bizref royalty.

For my full business librarian origin story as well as this book’s origin story, see the preface of the original edition. Essentially, it boils down to the following: if I can do it, so can you (really!), and I hope this book provides some guidance along the way. My initial goal in writing the original edition of *Making Sense* was to help other librarians who might be struggling with or intimidated by bizref as I once was back in the day, and I hope that this updated edition of *Making Sense* continues to serve as an approachable and enlightening resource.

The Bizref Question

NO ONE IS BORN knowing how to do business research. Throughout this book you'll hopefully find some tips and strategies that you can incorporate into your own bizref tool kit. In this chapter, we'll start by examining business reference questions and exploring how to break them into manageable pieces. Once you've identified a question's core components, you'll have a better idea of how to approach it and which resources to turn to for finding answers.

But before we dive into business reference questions and their many facets, let's first go back to basics.

START WITH WHAT YOU *DO* KNOW

When you're faced with a business reference question and you're not quite sure how to approach it, it's easy to panic and freeze up. But remember that business reference questions are merely "regular" reference questions that happen to be about business. And as a trained research professional, you know what you're doing—really!

You already have a strong foundation upon which to build your business reference home. Not only are you able to handle tough reference questions on any

topic, but when it comes to business, you have additional subject expertise that you might not even realize. You've shopped (retail, grocery, apparel, footwear, consumer electronics, etc.), you've eaten (agriculture and food manufacturing, restaurants), and you've flown (airlines), driven a car (automotive), gone to the doctor (health care), used a cell phone (telecommunications), used an ATM or credit card (banking), balanced a checkbook (finance and accounting), watched TV and gone to the movies (entertainment), and more! You get the picture. Granted, it's not always that simple, but it's not that scary either.

Secret Business Reference Tip #1

A thorough reference interview is key to a successful business reference transaction.

Business reference questions can sometimes take you by surprise and throw you off your game. In your panic to answer, the reference interview can be rushed or even overlooked. Return to your reference roots and don't forget the basic starting point of the reference interview. Think back to your reference interview class (or look up *reference interview* and refresh your memory)—a lot of this is asking questions and thinking creatively, and you know how to do this. It's easy, though, to let your business reference fears get the better of you and to forget this in the heat of the moment. Take a deep breath and clarify what the patron is looking for before you dive headlong into the vast sea of potential sources of information. In most reference situations, and perhaps especially in business reference situations, you should rarely assume that patrons are asking for what they really want. Even if they *are* asking for what they want, it's possible that you can offer them even more than they expect if you take the opportunity to hear them out and delve a little below the surface of their initial question.

Here's a quick refresher on reference interview basics:

Listen to the question and make sure you understand what the patron is looking for.

Partner with the patron and use what you both know (or don't know) to guide the research process.

Don't be afraid to ask questions for clarification. Ask some open- and closed-ended questions and paraphrase the question in your own words:

- Open-ended example: What kinds of information are you looking for on the widget industry?
- Closed-ended example: Are you looking for the global market size of the widget industry or just the US market?
- Paraphrase example: So you're looking for quarterly sales for Company X?

As you build your business reference knowledge—and confidence—your ability to paraphrase and to ask targeted open- and closed-ended questions will

improve. One of my favorite questions, which works in many kinds of reference situations, is the following: “If I could give you exactly what you were searching for, what would it look like?” This puts the ball back in the patron’s court and can help give you some time and perhaps a better idea of what they really needs.

In addition to the questions you ask the patron as part of the reference interview, you want to ask yourself some questions, too, to make sure you’re heading in the right direction. For example, ask yourself, “What does the patron really want to know?” In other words, what is their *real* question? Don’t be misled by someone who throws around terminology or buzzwords. And don’t be afraid to ask them to define these terms and buzzwords, especially if you yourself don’t understand them. You may find they don’t actually know what the terms mean either—maybe they heard the terms somewhere or a professor uses them in class. Either way, once you get your patron talking in their own language, you’ll be that much closer to getting on the same page, from which you can then move forward.

IT’S NOT YOU, IT’S BUSINESS REFERENCE

You’ll sometimes find yourself in a business reference situation where you’re digging and digging and coming up empty-handed and either blaming your library’s lack of expensive business databases (where the answer *must* be hiding) or blaming yourself and your perceived lack of business reference knowledge for this failure. Stop right there, though, and take heart. Whether you’re a business reference novice or expert, and regardless of the business databases you may or may not have, there are times when the particular piece of information a patron is looking for is just simply *not* going to be found.

Secret Business Reference Tip #2

Some business reference questions can’t be answered.

Yes, you heard that right. One thing to keep in mind when faced with any kind of business reference question is that *not every question can be answered*. This may be the most important advice this book has to offer. In fact, beware the business reference question with a seemingly obvious answer. It’s often the question that seems so simple at first that will ultimately prove the most challenging. Of course, as a novice business librarian, it can be tricky to tell exactly which questions can and can’t be answered, but just knowing that there is not always an answer can be a relief in some cases.

As we delve more deeply into business reference questions and resources, the elusive nature of some of the data that people are often looking for will become more evident. This doesn’t mean you can sit back and say, “Oh, that’s probably one of those questions that just can’t be answered.” Instead, it’s more of a flag that you’ll have to be that much more creative and tenacious in your searching. Just know that with many business reference questions, you’ll often have to rethink the

initial approach and work with the patron to come up with an acceptable alternative. As with many reference scenarios, the alternative you come up with might be just as good, if not better, than what the patron originally thought they wanted.

So what can you do when faced with the seemingly impossible question that can't be answered? Here are some tips. Keep them in mind throughout the business reference interview and especially later as you dive into trying to answer the question:

First, ask yourself, “Who cares about this kind of information?” to help identify potential sources (more on this later in the book).

Think creatively! Remember to consider synonyms and employ search tricks (like wildcards, truncation, and proximity searching) and other strategies and keep an open mind when it comes to where you might find answers.

Break out whatever question you're dealing with into manageable chunks and chip away at them rather than take on a complex question all at once. Many business reference questions are fairly involved, and it often takes time to build an answer. A useful analogy I once heard compared the business research process to a hunt for pieces of the puzzle, not a search for the holy grail.

Trust your reference librarian instincts if answers aren't readily revealing themselves. Consider whether a company would want its competitors to know the type of information you're looking for. Is this kind of data even tracked? If so, would a company release it? For free?

Take a deep breath and forget about the clock—all this digging and creative thinking will take time. Remove some of that “ticking time bomb” pressure. Business reference hardly ever boils down to a simple question and a simple answer, so don't be afraid to take some time to get your bearings and explain to the patron the complexity of the task at hand. Chances are they've spent a good amount of time looking for the answer too and will hopefully not expect instant gratification.

Consider alternative strategies if your initial approach leaves you spinning your wheels. Know when to say when if you've hit a wall. Don't be afraid to step back and rethink your strategy or, even better, ask for help.

These tips will resurface throughout the rest of this book. Hopefully each chapter will give you some good ideas for where to look for clues as well as various strategies for how to approach various types of business reference questions.

Don't forget: You're a trained research professional, gosh darn it! An info-rangler, a reference maverick, a research maven. The reference and research

skills that got you to where you are today are subject agnostic. Also, like any skill, the more you do this, the better you will get. So, seasoned pros, take heart—you've got reference money in the bank here! And research newbies, don't worry—all the time you spend at a reference desk is an investment in your info future, whether it will hold business reference questions galore or other topics.

THE CORE FOUR

The essence of many business reference questions can be broken into four general categories, or what I like to call the Core Four of information.

Patrons who are asking a business reference question are generally looking for something that falls under one or more of the following categories:

- company information
- industry information
- investing/financial information
- consumer information/business statistics

This is admittedly a very simplified approach. Of course, there are other areas of business reference that stretch the limits of these categories, like questions involving regulatory or legal issues, for example, or those with a focus on international data. And yes, some of the categories are kind of bulked together, as with investing and finance or the consumer/statistics categories. However, starting with these basics can often help you determine the best strategies for solving even the most stumpifying of business reference stumpers. Also, Core Four sounds better than Core Six or Core Ten, doesn't it?

Let's look at some examples of the kinds of questions you might run across that can be considered business reference. Remember that the subject area of business can go way beyond standard company and industry questions and can touch upon lots of other subject areas, such as marketing or advertising, economics and government, management, or accounting. Some of these sample questions may seem more straightforward than others. Some may look like Greek to you (or another language, if you do in fact speak Greek). Don't worry about that for now. Just understand that business reference questions can come in many shapes and sizes and degrees of complexity.

Figure 1.1 provides some example questions and illustrates what likely sounds like a cacophony of random business questions being shouted at you from multiple directions at the reference desk. However, looking at these examples of business reference questions through the lens of the Core Four, you can lower the volume, so to speak, and break each question down to its basic elements, even if you don't have much business reference expertise. If you find yourself struggling with any of them—and there are one or two trick questions in the example list—then that's a signal to kick up the business reference interview a notch.



FIGURE 1.1

Here is the list of example business reference questions from figure 1.1 again, with their accompanying Core Four category or categories.

Who are the top executives at EDS? *Company information*

What is the most current national unemployment rate? *Statistical/demographic information*

What was Kraft Foods' stock price on 4/25/13? What were their 2015 sales? *Combo: company and stock/financial information (note: a bit of a trick question, since Kraft Foods went through some restructuring in 2012 as well as a merger with Heinz in 2015—we'll cover more on this type of situation in chapter 5, "Investment Research," in the section "Historical Stock Prices")*

What is the market share of American Airlines? *Combo: industry and company information*

What are the quarterly sales and EBITDA for each Starbucks location in Michigan? *Combo: company and financial information*

Where is your RMA guide? *Depends: company financials or industry information, or both (note: another trick question if you're unfamiliar with this source—we'll cover it in chapter 5, "Investment Research," in the section "Industry and Financial Ratios")*

Can you point me toward where to find information on the smoothie industry? *Industry information*

What is the target market for Xbox One? *Combo: statistical/demographic and industry information*

Later in this book, we'll dive into each of the Core Four categories and then some, so don't worry if the categories for each of the questions aren't immediately

obvious to you. For now, consider this the warm-up portion of your business reference workout and get ready to pump some bizref iron in the later chapters!

TEACHABLE MOMENTS

There will be many times when a business reference question isn't just a quick "check this resource, here's your answer" kind of situation. Use the business reference interview to educate the patron, and to remind yourself, that business research is a process. I like to tell patrons that it's called research for a reason—first you search, then you re-search, and then you search again. There's also a reason that they couldn't just google the question and find what they're looking for, and as you partner with them to tackle their question head-on, you can help them realize that business research takes patience, creative thinking, and tenacity.

When you're in the throes of the business reference interview and throughout the time you spend working on answering the question at hand, try to grab on to teachable moments and strive to exceed expectations—both the patron's and your own. You will be doing both yourself and the patron a service if you think aloud as you work with them to answer their questions. Talk out loud and articulate your steps and thoughts. Describe what you are doing and what resources you are using. You'll become more adept at this kind of thinking aloud as you gain more experience in this area, but keeping the patron engaged and part of the process will benefit both of you in the long run.

Explain to the patron, too, that you're showing them where to go and giving them search tips to try out on their own so that they can grow their own research and database-searching skills.

As you'll discover throughout this book, business reference is not the most straightforward of processes, and this thinking aloud will not only serve as instruction for the patron but also open opportunities for them to clarify or notice something additional they can use. And when you're thinking aloud, you offer the chance for a colleague to overhear and perhaps jump in with a suggestion—when it comes to tricky business reference questions, the more, the merrier!

START MAKING SENSE!

- Ask your colleagues to share some business reference question examples and try to categorize them using the Core Four method.
- Think about the kinds of business reference questions you deal with most often. Which of the Core Four categories come up most frequently?
- The next time you have an opportunity to do so, whether with a business reference question or a "regular" one, consciously conduct a reference interview and also look for teachable moments.

- As you familiarize yourself with the sources covered in this book, pick a favorite company or industry and see what you can find in the different databases and other resources. Can't think of any companies? Try Apple and Microsoft or Target and Walmart or your favorite grocery store or bank. Can't think of an industry? Figure out how to browse through the content of some of the sources and see if anything jumps out, or try an industry mentioned earlier. Or scan the business news online or in the paper and use it to get inspired (OK, maybe *inspired* isn't the right word!).
- Think of a bizref question that has challenged you in the past (or skim through the Stumpers section) and keep it in mind as you read through the rest of these chapters. Maybe by the end of the book the question won't seem as challenging to you any longer.

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