Collaborating—Key to Providing Complete Answers Online and Off
by Risa Sacks

Collaboration among independent information professionals is a worthwhile strategy for the right research project. Working together can supplement gaps in language, expertise and research skills. There is often a need for primary research, seeking information from original resources rather than online, but an info pro may be unable to pursue them due to confidentiality, impartiality, limited time or other reasons. A colleague skilled in primary research can fill in gaps and hard-to-access details, provide insight on attitudes and opinions, dig for clarification or more current information or even explain why online searching retrieves nothing on a topic. A successful collaboration demands sharing of information gathered and still needed, any limits to be honored and a reasonable timeframe. Organizations such as the Association of Independent Information Professionals provide directories of individuals with specific types of research skills.

Why Collaborate with a Primary Research Specialist
Some information professionals are equally competent and comfortable in the online and off-line worlds, but for many of us, collaboration is useful in key situations. I do basic, credible online searching. However for truly comprehensive online results, I call on one of my AIIP colleagues — those online geniuses who play the databases like a Stradivarius; you’ve met some of them in other articles in this section. Equally, there are a number of reasons why an information professional might collaborate with a primary research specialist. Here are a few:
Personal preference and/or Skill. Some information professionals would rather have a root canal without anesthesia than suffer through hours on the phone. They can handle 500 complex references without blinking an eye, but would choose not to deal with 500 cranky bureaucrats. For them, a single phone call to a fellow professional removes the pain and provides better results and better use of their time and resources.

Convenience/Not set up to call/Overload. A staff or individual information professional may handle a large number of online inquiries, but not be organized to accommodate the time and concentrated effort that a primary project may entail. Or any information professional may need to unload the overload at times. For them, a virtual staff of primary researchers provides the extra phone capabilities to meet deadlines and provide complete solutions for the clients.

Confidentiality. Sometimes it is critical that the client/company not be identified. The very fact that company XYZ is asking about the feasibility of a new technology or market can, in itself, raise red flags in the field. In these cases, the primary research consultant’s company is asking the questions and providing a shield of confidentiality.

Impartiality. Whether you can identify the client or not, there are advantages to having a third party ask the questions. People will frequently speak more openly to a third party. If I can offer anonymity, they often provide yet more in depth and honest information. Frequently, when collaborating or subcontracting for another independent information professional or research firm, I don’t know who the ultimate client is. I can honestly say “I don’t know whom the information is ultimately for,” and it keeps me from having even unconscious biases that could skew responses and results. In these circumstances, clients get results that may be deeper, broader, more honest and less biased than otherwise possible.

When to Call
The best information professionals have a keen sense of when to add primary research to the mix and collaborate with a primary researcher. One researcher refers to it as “when web-based searching reaches the limits of its usefulness.” Here are some examples of when primary collaboration may help.

The “Too” Rule. The information you need is too wide, specific, new, old, weird or whatever for the online world. “How many stolen rental cars were involved in injury accidents in California from 2000-2006?” “Is this case still alive in the EU court as of today?” “How will this completely new technology play in the marketplace?” “What four manufacturing plants were involved in the 1965 buyout of private company Z?” You’re providing the exact information your client requested, not just what someone else chose to write about – and you look like a genius!

Soft information. How does someone feel about an issue? What are the emotions behind the words? What are the nuances that can never come across on the printed page or even in a video or audio file? What do colleagues/customers/experts really think about an individual or company? What are their intentions going forward? This unique information may provide your clients a competitive edge and a deeper understanding of relevant factors.

Confirming, updating, clarifying. Is this published quote or data correct? Has the situation/information changed since publication? What in the world did this statement mean? How about these conflicting studies? The primary collaboration, by going the extra mile, may provide information that is more accurate, current and unambiguous than online results alone.

Proving a negative. Nothing is showing up online, or nothing definitive. Mary Ellen Bates commented that it is hard to prove a negative online and difficult to know when to stop searching. Talking with the experts can confirm, for example, that the answer to this “is zero” because it is not handled this way or that nothing has been published yet because of a specific restriction in this area.

Ways to Collaborate
Range of Options. Collaborations can range from “I need you to validate and update these few specific facts” to “Here’s what the client needs – get it
done!” The primary researcher can provide anything from the brief answer to a single question, to write-ups of interviews or bullet points of information, to analysis and synthesis, or writing the complete report in your voice using your templates and desired format. In collaborating, the primary researcher may work, for example, completely independently or directly with the client as a staff member of yours or as part of a larger research team.

**Keys to Successful Primary/Secondary Collaboration.** Some general guidelines that contribute to successful collaboration include the following:

- Give the primary researcher whatever information you have, including secondary research results, relevant contacts and any guidance provided by the client.
- Clearly define what the primary researcher can say, not say and offer such as confidentiality, anonymity or reports to share.
- Allow as long a timeframe as possible – you can’t necessarily reach someone this very minute, and you are limited by normal business hours in the relevant location.

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**How to Find Collaborator**

**Identify Specific Primary Needs.** Does this project involve competitive intelligence (CI)? In-depth interviews? Specific geographical, language and/or cultural requirements?

**Resources to Find Primary Specialists.** Ask for referrals – personal chemistry as well as skills matter. Search membership directories of professional organizations, including AIIP (search by all the criteria mentioned above); the Strategic and Competitive Intelligence Professionals (CI by category); the Qualitative Research Consultants Association (focus groups and other qualitative research).

**Final Words**

Treat this type of collaboration as an iterative process – primary may turn up new directions for secondary – secondary may provide new leads to call. Whatever the specifics of your collaboration, let the process enrich both your results and your experience as an information professional.