

Personalized user training with card sorting in corporate environment: “Make sure you have the right information that you need in your work”

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Abstract

Introducing best available information sources and services to specialists starting in a new position is one of the tasks of Information Services in Orion Corporation. We developed a deck of cards to help us in finding out training attendants' information needs and to personalize the training. In this paper we describe the process of creating the cards and how they are used in our training. We also share results of an attendant survey and address other outcomes of the project.

Key words: information services; teaching methods; user training; card sorting technique; corporate libraries.

Introduction

Introducing available information sources and services to specialists starting in a new position is one of the tasks of Information Services in Orion Corporation. To make this user training more efficient we needed to have more interaction with the attendants and to know more of their individual information needs. We developed a tool to personalize the training: a deck of cards containing basic information needs and the main sources that best address them. In a training session the attendant chooses cards relevant to her/him and those are the topics of discussion.

Creating our deck of cards

Orion's personnel of 3200 represent highly special information needs in e.g. chemistry, medicine and pharmacy. Information Services is set out to match these needs with a variety of information sources (databases and publications) and services. As most of Information Services' offerings are actually self-services, efficient training for their use is needed.

Information Services has been struggling with keeping introductory trainings to information sources and

services short, focused and relevant to the attendants. We used to present just basic self-services, most used databases and on-request services, but even this condensed model didn't work well in group trainings. In our opinion the main issue was the lack of relevancy. The attendants lost interest quickly if the presented source was not relevant to them. In one-to-one trainings, where the trainer was able to interview the attendant in parallel, finding out and acting on personal information needs was easier. However, we found this time consuming and not structured enough.

Beth St. Jean's article on investigating the changing information needs among diabetics at different stages of their patient journey (1) gave us an idea to apply card sorting to user training. Card sorting is a technique to explore how people group items. A person is given a deck of cards and asked to sort or group the cards according to given instructions (2). The technique is typically used in designing web sites and in information behavior research, but according to literature it has been tested even in end-of-life treatment decisions in a hospital setting (3).

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Our idea to be tested was to make cards with an information need on the top of each card, and the answer, the main sources that best address that particular need on the back. In a training the attendant would choose the most relevant cards (= information needs) for the topics of discussion. This way the attendant would actually personalize the training for her or himself. We also wanted to know if the cards would act as marketing material. Would a person get a full enough picture of all our service offerings when going through the cards?

To create a list of basic information needs for the cards we categorized our users known information needs and our own services and information sources. We started the work with mind mapping. With tight prioritization, helped with our experience in the company with knowledge of the most frequently asked questions and basic librarian skills in indexing, we came up with a preliminary list of topics for the cards. This list of information needs with the best matching sources was then discussed with the rest of the team, our three information specialist colleagues. It was an iterative process; some topics and sources needed to be discussed several times before we were happy and the result, the cards were clear enough. Along the way we decided to address the issues as our clients would, to try to use terms they would use and state some real questions on the cards. Also, we decided that it's ok to have some overlapping topics on the cards.

We resulted with a deck of 41 cards. The deck was created both in Finnish and in English. There are a few cards on our unit, e.g. who we are, our main services and how to reach us. Then we have cards on journals, books and databases (*Figure 1*).

Book and journal cards address the most frequently asked questions on publications, e.g. "How can I follow-up published information automatically and in real-time?", "I need a specific article – how should I proceed?" and "What newspapers can I read on my mobile?". Subject specific topics are presented on database cards, which is the largest group with 18 cards in it. Here are some examples of the those cards: "Information on medicinal products on the

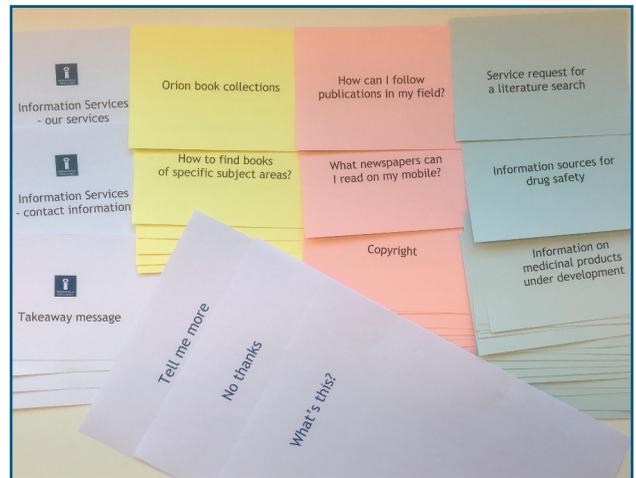


Fig. 1. Card examples and sorting categories.

market", "Research outcomes – what has been published on a certain topic", "How to follow-up news?", "Drug information and guidance provided by the authorities", "Medical reference books", "Biomedical databases and portals" and "Information sources for animal sciences".

The three categories the attendant of a training sorts the cards into are predecided by us. The categories are: "Tell me more", "No thanks" and "What's this?". The "What's this?" category is for any unclear cards that the attendant might need to think over. We also have color coding on the cards. It helps us in the training, as it allows an information specialist to quickly pick up all database cards sorted into the "Tell me more" pile and lead the discussion on them. An information coordinator collects Books and Journals cards with a different color and takes a lead with those in turn.

The new training in practice

The name of our new training is Information Services for Your Work. It is a personal, face-to-face consultation session lasting from 60 to 90 minutes and it's available either in Finnish or in English. Attendants are most often specialists starting in a new position. There are both an information specialist and an information coordinator present in each training. Prior to the training we ask the attendants to shortly describe their work and to state any special information needs or use related

questions they might already have in mind. This helps us to prepare for the training and think of relevant search terms for online demonstrations. The training session starts with short introductions and by showing Information Services' home page on intranet and our Yammer discussion group. After answering the questions stated beforehand we give the attendant a deck of cards to sort. She or he sorts the cards in three categories according to her/his own information needs (*Figure 2*).



Fig. 2. *Sorting the cards.*

Sorting takes usually about 5 minutes. Discussing the topics the attendant want's to hear more of, and demonstrating the sources online takes the majority of the training session. We also agree on a follow-up plan, which can include providing user names for databases, setting up search alerts together and other similar task that will be handled after the training.

“Make sure you have the right information that you need in your work” is the takeaway message of our training. We want our users to be familiar with up-to-date information sources and publications best suited for their work, and that they are able to use them with confidence. The ultimate goal is that they have the right information needed for their work. The responsibility lies with the users and Information Services' role is to support them.

Our experiences of the new training are extremely positive. The most important thing is that now the attendants get to choose the topics of their training. Lacking relevancy is not an issue any more, we really have their full attention, as the focus of a training is based on the attendant's actual needs and we all work together to find the best solutions. For us trainers the new style of training has given in-depth and inspiring discussions with the specialists. It has broadened our understanding of information uses and needs within the company.

Card sorting has proven to be a quick way to drill down to personal information needs. Feedback from the attendants is that sorting is easy and even fun. It's not considered too childish, which was something we were a bit nervous of in the beginning. The deck of cards act well as marketing material, too. Even if a topic is not relevant for the attendant at the time of the training, it might be checked afterwards (the attendants are welcome to take the deck with them, or they can visit our web site for the same information). To our surprise we have also been asked a deck without a training session, which tells us that a) people tell their colleagues about the training, b) the cards are seen as an useful reference tool for curated information sources, and c) that not all orionnees are yet familiar with our intranet site.

This new type of giving user training as personal consultation sessions requires more resources from our unit compared to the former group trainings, which were arranged twice a year. Luckily this is not currently an issue for us as the training is considered a vital part of orienting new specialists in the company.

The sorting results of attendants are recorded. This gives us an opportunity to evaluate the usefulness of each card and develop the deck further. If a card is not chosen much, we can either improve the wording of it, or discard it and include another topic instead. So far, based on the first 19 sessions organized in 2017 and in early 2018, the most frequently chosen cards appear to state basic questions about publications. (*Table 1*).

Award for the best oral presentation

The seldom chosen cards on the other hand represent sources that are not much needed by the research and development personnel, which is the largest attendant group (Table 2).

We also survey the opinions of the attendants after the training. A questionnaire is sent out a month

after the training. 12 out of 19 attendants have responded. They all got new information, found the training useful, felt that the training was based on their information needs and found card sorting helpful. All but one think that the sources, services and publications provided by Information Services are useful and have started using them (Table 3).

Most popular cards	Attendants
How can I follow-up published information automatically and in real-time?	72 %
How to find books of specific subject areas?	72 %
I need a specific article - how should I proceed?	72 %
What journal subscriptions does Orion have?	72 %
What types of publications are there in Orion collections?	72 %
How to conduct a literature search?	67 %

Table 1. Most popular cards.

Least popular cards	Attendants
Legal and financial information sources	6 %
My own question(s)	6 %
Information Services - contact information	17 %
Information sources for medicinal chemistry	17 %
Information sources for quality assurance	17 %
How to conduct a literature search?	67 %

Table 2. Least popular cards.

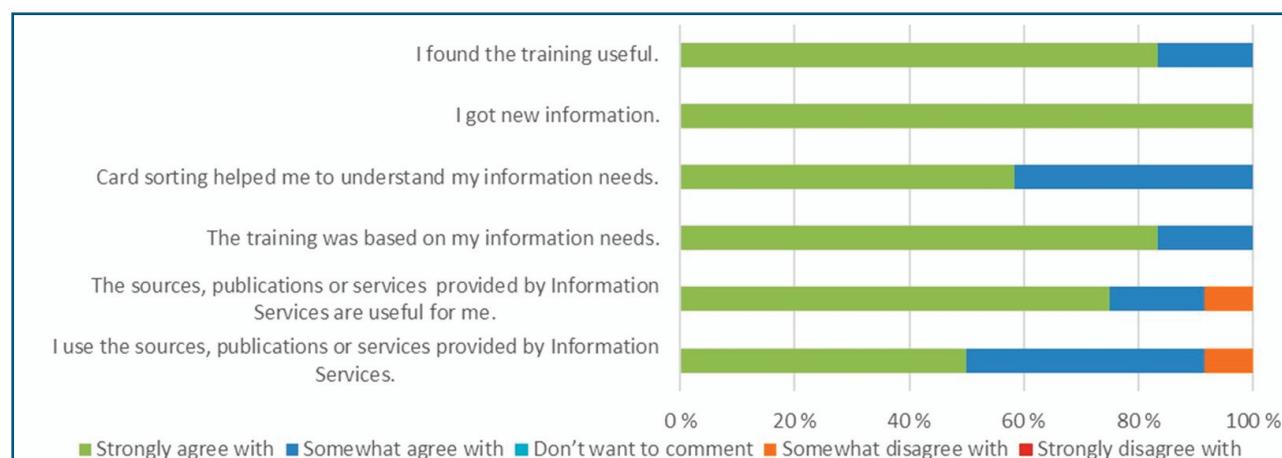


Table 3. Results of attendant survey (N = 12).

Conclusion

The project of creating a better model for introductory user training in our corporate information services setting can be considered successful. The developed tool, a deck of cards containing information needs, sources and services, and the use of it, sorting during a personal training session and using sorting result as a basis of the conversation, have proven applicable and useful. Users get personalized training or consultation for their individual information needs, and giving training now feels easy, well structured and inspiring. A pleasant side-effect of the new training is better interaction with our customers. There's a great value in meeting face-to-face with the customers, specially with newcomers in the company. Once we met in person it's easier to continue via email and Skype.

We have been able to utilize the categorized information needs and the corresponding answers, the sources that best address them, in another way, too. Our redesigned intranet site is now based on the recommended sources by topic-theme. Future developments might include digitalizing the cards. It would allow us to enhance the training of clients

working outside Finland. Or maybe we could produce a course on an e-learning platform, combining card sorting, our website and practicing online with actual databases. That would be exciting!

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