Mary Ellen Bates

Business Research for Business Professionals

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Let's begin with your background. Tell me how you came to be an independent information business owner.

I started out as a special librarian and worked for a number of years in law libraries, in both private law firms and for the federal court system, and then went on to manage the library at MCI. After a while, I realized my career path as a corporate or special librarian would require that I manage more people and get more into administration, which I really didn't want to do. I have an independent streak a mile wide in my makeup, and somewhere around the mid-1980s I heard of information brokering. I remember thinking that it sounded like an interesting thing to do. I thought about it for several years, started saving business cards and—more importantly—my money, and imagined what it would be like to be working from home

and running my own business. And then I just did it. I quit my job and my first client was my last employer, MCI.

Thinking about your work as a special librarian, what experience did you gain that was important or valuable to your work as an independent?

Mainly it was my experience at MCI. At the time that I worked there, it was a small, entrepreneurial kind of wild-and-crazy place where you could make any mistake as long as you didn't make the same mistake twice. And you could try anything as long as it didn't cost anything, which was a great experience. It encouraged creativity and risk taking, and I learned a lot about how to market myself and the information service within the organization. People didn't know about the library when I started it, so a lot of my efforts involved marketing within the company. I learned how to manage a budget and did all kinds of research. A firm background in information from my M.L.S. at Berkeley helped too, because it gave me a foundation to think about how information is organized and managed.

You prompted my next question about your formal education. Which pieces of your undergraduate and graduate degrees were relevant to your business?

Well, not much in my B.A., which is in mathematical philosophy—although, as it turns out, that was Boolean logic back in the early days before many people thought that way. When I got my bachelor's degree, I swore I would never work with computers, but then I stumbled into my first library job and took to it like a fish to water. That's what prompted me to go back and get my M.L.S. I was managing a database within a library at a law firm, having had no idea what I was getting into when I started, but finding that I loved it.

Can you think of any courses in your library training that stand out?

I took one course in special librarianship, which was the only one they had twenty years ago. I took a lot of programming and computer classes; one of the benefits of being a graduate student at Berkeley was that you could bump the undergraduates to get into the popular computer classes. You didn't have to take all your courses within the library school, so I took a good amount of information technology and information management courses as well as the regular M.L.S. coursework.

That sounds like a good foundation to understand the computer side of our business.

I wouldn't necessarily encourage people to do that today. That was back when people were using punch cards for programming. At the time it was very useful, because at my first job I was building databases, and it was a very low-level kind of programming that I had to do. These days, I would certainly encourage people to take more business classes, because you have to talk the lingo. I just didn't see myself being a corporate librarian when I was going to library school.

How did you handle the logistics of getting started, such as setting up your office space and equipment?

I was lucky in that my house has a full basement that I used to rent out. It was empty at the time that I started my business, so I took it over, which was nice because I had a little kitchen and the whole nine yards. The living room became my office. The first thing I did was contract with a graphic artist to design a corporate logo. It took a long time to get a logo that the artist and I were happy with. I'm really glad I did that, because it enabled me to start my business looking established. I wince when I see new businesses that have funky-looking stationery and business

cards—it looks like they've just started out and aren't willing to spend any money on their business. The logo design cost a lot of money, but I'm really glad I made the investment.

Then I went out and bought a computer, the highest-end printer I could find, a fax machine; I got all my different phone lines in order, did the paperwork for the local Washington DC business licensing agency, and set up accounts with the online services.

What about professional advice from an attorney or accountant?

I did some brief consulting with an attorney. I didn't talk to an accountant in the beginning, as I'm pretty comfortable with that kind of thing. My attorney helped me think through my corporate structure; the best choice for me was to set up as a sole proprietorship. Then I just bought QuickBooks [104, see Appendix] and set up my business accounts to make it easy to report my income and expenses to the IRS.

I did all this planning and preparation on weekends and evenings, before I actually launched my business, and I took a few vacation days from my job. That was important because then, when I started, I didn't have any excuse. I couldn't say, "Oh well, I can't really start marketing myself yet because I have to noodle around with my computer a little while." I had all this stuff done, so that on day one, I had to get out there and start hustling.

What are the advantages of having your office in your home?

Actually, my office is outside my home now. After about five years we did a major renovation of the house, and I moved my office to a carriage house above the garage, so it's separate from the house itself. This is even better because I cannot go out there to just check my email and get sucked into two hours of work after dinner. It's ideal for me because I don't have to deal with a

commute, but it's separate enough from the house itself that I can manage the time that I'm spending there.

So there's a physical separation there as well as the psychological separation.

Exactly.

Thinking back to the early days of your business, your first client was your previous employer. What about the clients that you had to go out there and find?

I had been collecting business cards for several years before I started my business, and one of the first things I did once I started working on my own was to send out letters and brochures to everyone I knew announcing that I had started my business, and to please give me a call if I could be of assistance. Then about a month later, I sent out postcards saying hello from Bates Information Services, and here are some of the projects we've worked on recently. I'm still in the habit of sending postcards out every few months because you just have to get your name in front of clients' faces all the time. Once I did that, some of the people who had known me before started calling, but it was a slow process. I gave a talk for the local Special Libraries Association (SLA) [201] chapter about how to select an information broker and things that potential clients should ask, and got a little bit of work that way. I also contacted an association of sales managers and had an article published in their journal.

Any hard lessons or anything you might have done differently, looking back?

It's really funny. I heard from other people and read in books such as *The Information Broker's Handbook* [230] that cold calling doesn't work, mass mailing doesn't work. And I said, "Well, maybe it doesn't for you, but maybe it will for me." And I tried

it—and it doesn't work. Cold calling is so painful anyway, I quit because I couldn't stand it. Then I did small mass mailings, if that isn't an oxymoron, but got no responses at all and realized that was not something that was going to work. So I don't think it was a huge mistake or a wasted effort, but I've got an independent streak and sometimes I don't learn from advice. Since then, I have learned to take other people's advice a little more to heart. When I keep hearing over and over again that something doesn't work, I recognize that it probably doesn't work.

Let's move things up to today. Tell me about your business and the services you offer, and how you describe yourself.

I generally tell people that I provide business research to business professionals and corporate librarians, and consulting services to the online industry. The majority of my work is business research for people in companies, or for consultants, and that's pretty broad. It includes everything from "Tell me about who manufactures and who buys optical amplifiers" to "What are trends in the prefabricated housing market in Japan?"

Some research is a little less straightforward. For example, I worked with a public relations firm to build a portal site on business process re-engineering, and my part was finding and annotating Web sites that they could plug into the portal. My online consulting is with professional online services as well as start-ups—dot-com type companies—where I help them understand their market and how to establish their business.

I was looking at your Web site recently to see what you've been up to, and I noticed that you have highlighted your advanced reference interview skills training. Could you tell me about that?

I do half-day training courses in advanced reference interviewing techniques. It's interesting, because all the talk about providing good service and meeting the needs of clients and understanding the market comes back to understanding user needs, and that all comes back to doing a good reference interview. It's something that librarians take for granted, especially people who have been doing it for five or ten years. They find that it's really useful to spend half a day thinking about the whole process and developing some new techniques, and learning to actually manage the process instead of just taking a request. They realize that the whole thing is a negotiation, a two-way street with a lot of interaction.

So your market for that training course is primarily librarians?

Yes. I gave a couple of talks and then all of a sudden people started calling and asking me to come and do the workshop for their organization. It's becoming quite popular.

Now, taking a look at the actual research you do, what commercial online systems do you subscribe to?

I subscribe to Dialog [35], Dow Jones [39], LexisNexis [69], Profound [100], DataStar [30], Hoover's [56], and Stat-USA [120]. I set up other accounts as needed, and of course there are aggregators on the Web that I use.

How do you know when to use a commercial online system? What type of information do you go there for?

It's when I need to use the power search tools, when I need authenticated information, when I need to do in-depth research, when I need to offer value-added research. Clients can do Web searches themselves. What I offer when I use a professional

online service is access to information that they can't get somewhere else. I would say there are very few research projects where I don't spend at least part of the time in a professional online service. I think it's malpractice not to use them, because there is so much stuff there that you can't find just searching on the open Web.

Could you tie that into an example of a general industry research project?

One big research project that I did recently involved consumer perceptions of color ink-jet printers. Why they buy color ink-jet printers, what factors do they take into account, what don't they like about them, and what features do they look for. It was real broad. I started out going to the Web sites of the main color ink-jet printer manufacturers to look through their spec sheets to see how they describe their product, which helped me identify what they thought differentiated the products. I looked at what features they had that their competitors didn't have, to get a general sense of what to watch for. Then I went to the professional online services to search through newspapers. I needed to scan as many papers as I could find, thinking that most newspapers have an "Ask the Computer Guy" kind of column. Believe it or not, I actually looked through *Dear Abby* and *Ann Landers*, and there was a discussion in one of those two columns about that very topic. Then I went over to the industry newsletters for the digital camera/printer market and found a lot of good stuff there. I went into the general trade press and found what the photography, computer, and printing/publishing press were saying. I also purchased individual pages online from market research reports. I covered a lot of ground in maybe an hour, and never would have been able to cover those sources on the open Web, and certainly not in that amount of time. I did end the search on the Web, however, checking computer discussion forums and Usenet [128] newsgroups, and found one market research study about ink-jet printed pages. Once the searching

was done, I spent a lot of time doing analysis of what people were saying—the hot buttons, the percentage of comments that were positive and negative, what people were saying about specific brands and specific issues, whether they consider particular features to be a drawback or not. It was a long project, but a lot of fun.

That leads into my next question about the Internet. Could you talk about the open Web versus the invisible Web, and what kinds of things you'd find on each?

My use of the phrase "open Web" means that it's stuff you can find using a search engine, keeping in mind that no search engine covers more than fifteen percent of the open Web, and that even searching a number of search engines together is only going to catch maybe forty or fifty percent of the Web. I'll search the open Web if I'm just looking for a needle in a haystack, or for any mention of a topic. Your gut kind of tells you that it's the sort of thing that's likely to be out there. Another category, which I call "gated sites"—these terms are from *Researching Online For Dummies* [235], which I co-wrote with Reva Basch—would be things like most newspaper archives, where the back issues of newspapers are often available online, but you can only get them by going from one paper's site to the next and doing a search in each paper's archives. Market research companies will sometimes put summaries of their market research up on their Web sites, but this means doing a search at each individual site to find the information you want, and often you have to register before you can even do that. Then there are the professional online services, which are another flavor of the gated Web—sources like Dialog or Dow Jones that require a subscription and a familiarity with advanced search techniques.

What about locating PDF files?

That's just part of the invisible, or perhaps I should call it the semi-opaque, Web. PDF files are somewhat searchable through Google [53]; in fact, there are a couple of ways to search them. Say you're looking for PDF files that discuss competitive intelligence. You would type "competitive intelligence" filetype:pdf or you could type "competitive intelligence inurl:pdf". It's not a comprehensive search of PDF files, but it beats any of the other search engines. Other types of formatted files are harder to find and generally aren't indexed by search engines. The best way to find them is to rely on portals, subject guides, and other finding tools built by experts in the field.

When you're out there on the open Web, how do you evaluate a site for reliability?

Just like librarians have always evaluated sources. You look for features such as who's maintaining it, what point of view do they have, do you recognize the brand, does the material sound right or does it sound weird? You look to see how frequently pages are updated. If you find dead links, you tend to think it's less reliable. I generally don't have time to contact the Web site owner and ask questions, although some people do that. I go by first impression. If it's something I recognize or that seems to be authoritative I'll give it more credibility than if it's Joe Blow's Web site.

Do you have any favorite Web sites for business and company research?

If I have to use a search engine, which is usually my last choice, I'll use Google. I tend to use About.com [4] because of the industry guides, portals such as the Librarians' Index to the Internet [70], and the Dow Jones Business Directory [38]. For U.S. companies, I always look through the EDGAR filings at the U.S. Securities and Exchange Commission's (SEC) site [130] or at FreeEdgar.com [49]. I also use Corporate Information [27], Wall Street Research Net [137], Business.com [17], and CEO

Express [21]—they are all well-organized directories of business-related sites.

Do you ever have projects that take you back to the books? I'm thinking about print sources, archival research. Or is that the kind of thing you might subcontract out?

I subcontract out all my library research, mainly because when you do library research you usually have to photocopy stuff at some point. I don't have an account with the Copyright Clearance Center (CCC) [177] or any other way of paying royalties for any of those photocopies, so I contract out all of my photocopying and manual library research to people who have CCC accounts.

While we're talking about subcontracting, you've said before that you sub out all your telephone research. In a typical project, do you find the sources and sub out "Please call Joe Jones at ABC company?" Or do you just tell your subcontractor "I need an expert on the XYZ industry to tell us …?"

It depends on the project. It's not just "find an expert," but it's "Contact this company because we need to find out about X." You can't really drill down to the right person from an online directory. The other phone research that I often get is something like, "Identify the government source for X." Again, I'll give my subcontractor whatever pointers I have, but most of that's just going through government phone trees until you find the people you need to talk to. I do what I can to help, but I use phone researchers to do some of that initial research, too. I don't hire people who say, "Give me the phone number for the people to call and I'll call them." That's useless; I need someone who can help me *find* those experts.

How do you price your projects? What kind of billing works for you?

I work on an hourly rate basis, but I establish a not-to-exceed budget on all my projects. That's the only way I can work with a client to figure out how big a job is supposed to be and how much the client wants to spend on it.

Do most of your clients want to see work in hard copy or electronic form?

It's almost all electronic. I've got a few clients who accept hard copy, too, but very few. In fact I noticed recently that I haven't ordered new stationery in about two years. I used to go through it every six months. I'm just not sending out that much stuff in hard copy anymore, because most clients would rather have it in electronic format. It's easier for me that way also.

We often hear the term "value-added services" today, and I'm wondering how much of a typical project is actual information retrieval versus value-added services, compared to when you first started out.

I'm certainly doing more analysis today than I used to, partly because people have the budget for it. People are more stressed out and pressed for time, and would rather have their researchers do those extra steps of synthesizing and analyzing material rather than just give them a data dump. It varies by project, but for me the ratio is about 60:40 or 70:30 research to analysis. That includes summarizing material, sometimes pulling together a PowerPoint presentation with the key points, highlighting key information, and doing spreadsheets or tables of data I've extracted.

How do you know when to end a project? Do you feel it's directed more by the budget, or by your time? Or do you just develop a sense for this over time?

Usually I can tell when I'm finished. I'm not going to spend any more time on a project if I find the answer right away. And sometimes it's just the particular subject; you could spend three times as long and find more stuff, but they need it tomorrow and there are only so many hours in the day, and this is as much as I can do in that time.

Looking at your range of services, speaking and writing are also a big part of what you do. How do you maintain your balance of research versus writing vs. speaking?

I started out viewing my speaking and writing mainly as marketing tools, because it's a great way of establishing credibility and developing contacts. Since then, they've become revenue sources. For example, I do a talk on the future of the information profession for special librarians and offer a challenge to think differently about our profession. It's been so well received that, after every talk I do for a library group, I get two or three people asking if I can do a similar talk for all the librarians within their organization. It's the same thing with the advanced reference interview skills. That started out as a talk I gave at Online World [91] a number of years ago, and has morphed into more of a revenue source than I had originally anticipated. And I always learn; at every single speaking gig I get something back from people in the form of new ideas, and I really enjoy it. It's been a tremendous source of renewal and a way to keep me fresh.

Wow. We haven't even gotten to your writing yet.

I write for *Searcher* [223] and have a back-page column in both *EContent* [212] and *Online* [220] magazines. I'm also the contributing editor for the *Information Advisor* [215] newsletter.

In 1999–2000 I finished three books in twelve months, and that was something I'll never do again. They were all very different books, and I enjoyed each of them. The experience was fun, but it was just a huge amount of work. My most recent one was *Mining for Gold on the Internet* [233], published by McGraw-Hill. It's about how to find investment and financial information on the Internet. Before that was the second edition of *Researching Online For Dummies*, which I did with Reva Basch. That was written for a more general audience—obviously not for dummies, but for people who are serious about researching. That was a lot of fun in a completely different way, and it's always great working with Reva. The other was *Super Searchers Do Business* [237], which was the first of the Super Searchers series, and is a collection of interviews with business researchers. So, three very different books in very different formats; all focusing on online research, but with very different emphasis.

I've since completed another Super Searchers book on global research, *Super Searchers Cover the World* [236]. Like the other Super Searchers books, it's a collection of interviews with expert online researchers; this one consists of fifteen interviews with people from all over the world. It was a tremendous experience, getting such different perspectives on the research process.

Sounds like you have to manage a pretty intense schedule.

I would say I average two speaking engagements a month. Spring and fall are definitely the busy times for speaking because that's when most of the professional conferences are. It's tough in the sense that I'm a one-person business and every day that I'm out speaking somewhere is a day that I'm not in my office available to my clients. So there's always a trade-off, but

that's part of running a business. The writing workload really fluctuates.

How do you keep it all together? Do you rely on any favorite time-saving devices or tricks of the trade?

I use a hard-copy Franklin Planner and I can't imagine life without it. If I ever lost my Franklin Planner I'd have to shoot myself because I would completely lose everything. It's perfect for me. I put in my schedule for what's due when, figure out when I need to start preparing for it, and then I don't worry about it in the meantime; it's fabulous. That's my biggest secret. I work very well under deadline, so it's just a matter of keeping in my mind what needs to be done when, and working back from the deadlines. I use QuickBooks for accounting and Eudora Pro [44] for email, which I like because it filters all my email subscriptions into separate files.

Now that you are so well established in the profession, is there anything else you do specifically to market your services?

I continue to do the same things that worked in the beginning. I collect business cards from people and send out a client newsletter to all my prospects and clients. I also have a free quarterly email newsletter. I post the current one on my Web site and then do updates that I send to anyone who's on my subscription list. That's what I've been doing since day one and it's always worked, so I don't mess with it.

How important do you think it is to have your own Web page?

I never expect to get any business directly from it, because people who have time to surf the Web are not the people who are willing to pay for my kind of research. But it's like a listing in the

yellow pages. It shows a certain amount of credibility. It lets me have an online brochure, so if people have already heard about me they can go to the Web site and see what I've written and where I've spoken recently, to get a sense of what I'm all about before they call me. But I can't think of more than a couple of clients I've gotten directly from the Web site. I have not designed the Web page, nor do I intend it to be a way to actually attract clients from the Web itself.

Do you list yourself anywhere else? What about yellow pages or any industry or expert directories where you actually pay for a listing?

I'm a member of SLA and the Society of Competitive Intelligence Professionals (SCIP) [199], and am now an active speaker in both associations. I originally joined to have my name in their directories, so that's kind of an indirect payment for a listing. I'm also a member of AIIP (Association of Independent Information Professionals) [172].

I do not pay for a yellow-pages ad because most of my clients don't come from the local area, and I think it's foolish to pay for a yellow-pages listing in only one town if your clients are all over the country. I do have a business phone listing, as opposed to residential, because you have to sound credible to the client who is trying to find you through Directory Assistance. I've never seen the point in paying for listings in other directories because I don't think my clients would look there. I think if they did, they'd probably be calling ten of us, and I just don't have the time to bid against ten other information brokers. I would much rather spend my money and resources attracting people who come to me on a referral, or because they've read a book I've written, or heard a talk and are interested in having me do work for them.

That leads us into the importance of word-of-mouth marketing and client retention. What

kinds of things do you do to stay in touch with your core clients and keep them coming back?

Letters and postcards—that's pretty much it. When I have time and feel like doing some fun writing, I'll send out another newsletter issue. I send out postcards that show anonymized versions of a few of the recent projects I've done, and say "if you need any work done, call me at my 800 number." That always reminds a few people who haven't called me for a while to call back.

Thinking about how independent information professionals could define their success, how are you more effective working for a client as an independent rather than in-house? What can you do that you couldn't do if you were somebody's employee?

What I offer to clients is, number one, twenty years of online research experience, which they may not have in-house. I have subscriptions to a number of online services and a familiarity with them all, which a lot of in-house researchers would not. They may specialize in one online service, but not in the others outside their industry.

Some of my clients need someone outside the organization to do the research. They may not want their name associated with the project, or sometimes, even with Web searching, they don't want their email address connected with the research.

Another thing I offer is a fresh perspective. I can sometimes see the forest for the trees. Generally, the clients that I do research for either don't have a library themselves, don't have an in-house researcher at all, or it's their librarian who is calling me because he or she has a project that requires too much time and resources, and they need to outsource it. So, one of the other things I offer is simply the availability to do the work.

Now, with regard to the daily grind and the mechanics of running a business, do you handle all that yourself? Do you outsource any office tasks or have any employees?

I have no employees. Never have and don't intend to. I work really long hours and don't mind that. I keep all the work in-house, partly because I like knowing where it all is. I prefer to do the accounting myself because then I always have a handle on what's coming in, what's going out, cash flow, and profitability by quarter. I do just about all my own online research. I do my own marketing because I think I understand myself, my strengths, my value, and my clients better than someone on the outside would.

I do outsource tasks like stuffing envelopes. When I'm sending out a newsletter, there's a sheltered workshop nearby that does all the folding, labeling, and stamping, and they're great. A modest price and the work is fabulous.

We sometimes talk about the overwhelming amount of information in society today as a marketing angle for information professionals, but it's difficult even for us to stay current with everything. How do you track important industry developments?

I read all the information industry magazines. Generally, I get them read on the plane when I travel to speaking engagements. My carry-on luggage consists of five or six magazines. For the email newsletters, mailing lists, and discussion groups, I send them all to a folder in my email software and then download it to a little hand-held PC and read them on the subway. I read BUSLIB-L [148], the private discussion forum for AIIP members [146], SLA Business & Finance [157] and Solo Librarian's lists [161], the discussion list on Free Pint [150], and the Web Search newsletter from About.com [164].

Professional associations can be a great source of information, but they also provide a way to connect with people. As the first recipient of AIIP's Sue Rugge Memorial Award in 2000, you were recognized for your contributions to nurturing the growth of new business owners. Could you reflect a bit on that?

I was very surprised and touched to have been given the award. It really meant a lot to me, as Sue had been so helpful when I started my business, and she continued to be a friend and colleague until her death in June of 1999. I've benefited a lot from my membership in AIIP, and I'm grateful for all the help and informal mentoring that more experienced members offered to me when I started my business. I've always tried to pass along the favor to newer members, and I'm immensely grateful to have been given an award in Sue's honor.

What is the most bizarre client request or funniest project you've worked on?

One of the first jobs I got was to find out the history of bungee jumping. Oddly enough, I found the perfect article in *Playboy* magazine, which was available online on Dialog—without the pictures, of course. It was the whole story about how it was started by a group of kids in England that called themselves the Dangerous Boys or something like that, and they did dangerous things for fun. Bungee jumping was the most dangerous thing they could think up, so they started doing it and it caught on from there. The article included a description by the author of his first bungee jump, which was great. I would never in my life go bungee jumping, but it was a fun request and where I found the answer is sort of an interesting story—not one of your expected sources.

Running your own business, especially when it's in your home, is something that can take over your life if you don't maintain some balance. How do you escape when you need to?

Seeking balance, that's a tough thing. It's easy for the business to take over your life if you're not careful. An important thing to keep in mind, I think, is that we're better researchers if we have a life, and I'm not always the best example for having a life. One thing that helps is that I have a dog; that makes a big difference during the course of the day. I stop, take the dog for a walk, and get a reminder that it's not all work.

Yes, mine's lying next to me and I always hope that the UPS guy doesn't come when I'm on the phone, because she goes nuts and has interrupted more than one phone call that way.

Oh, no kidding! Mine's part husky, so she just starts howling sometimes when I'm on the phone and it's really embarrassing! It's funny; when I first started my business, practically nobody worked out of their homes. I was very conscious of whenever the dog would bark, and wouldn't want the client to hear that. I'd hit the mute button immediately. Since then, people laugh and say, "Oh you've got a dog. That's great." It's much more common to be dealing with independent people who work out of their homes, so it's not a downside like it used to be.

The other thing that keeps me sane is that I'm a long-distance runner, so that forces me to get out of the house several days a week to go on a long run. I run marathons several times a year. During the week when I need a break, a nice long run clears the mind. I don't think about work. I don't think about anything but running, and it's very cleansing.

When you work on your own, you have to be your own driving force. What do you think is

necessary on a personal level to keep it all together?

I think it's important to have a good support system behind you. It's an odd balance, because to succeed as an independent, you have to be a loner in the sense that you are comfortable working by yourself all day long and are self-motivated and self-managed, but you have to be good with people, too. It all comes down to client management skills. If you aren't a person whom your clients enjoy dealing with, they're going to find someone else who's easier to deal with.

The other thing that is important, and maybe this comes from my California roots, is maintaining a feeling of personal abundance—that your life is rich. That you have friends and family and interests outside of work, and that life is good. I think that generally having a positive attitude helps a lot. Feeling that you're not desperate or anxious for work. Being relaxed about the whole thing even when the calls don't come in. Knowing that you are a successful businessperson and that people *will* call you, and that the business *will* come in. Clients are attracted to people who feel happy and successful. If you can manage to avoid feeling desperate or anxious about your business, your clients are attracted to you in a way that they're not to someone who is nervous or scared about whether this is going to work or not.

I think that's an important element. You need to be confident enough to work alone, but when the phone rings you can switch gears and interact with people. Also, I remember feeling, in the beginning, just thrilled that someone would even want me to work for him or her. You get over that.

There are a couple of parts to that. Part of it is feeling confident enough that another job will come in that you can say no to this one. It's so important to be able to turn down a job. If you

don't think you can do a splendid job, if you think this is a push for you or that it goes beyond your capabilities, the worst thing you can do is take it on. At best, you'll barely manage to meet your client's expectations, and at worst you'll have a client who will tell fifteen other people how disappointed he is in your work. It's hard to turn down work in the beginning when the business isn't coming in, but you have to realize that you're better off spending that time marketing than taking on a job that you're going to tank at.

The other part is developing a sense that failure is not an option. When I started my business, I couldn't even imagine folding it. It just didn't enter my mind. From the very beginning, I was thinking about how it was going to feel to have been in business for two years. I think that makes a huge difference, because your vision almost subconsciously guides the decisions that you make. After a couple years into my business, a cousin of mine said, "Well, gee, I guess you're not looking for another job anymore, are you?" I just burst out laughing and said, "No, I'm not looking for a job at all. I always intended this to be a long-term business." In order to succeed, you can't take a "try it for awhile and see if it works" attitude. You have to be committed to doing this for at least two years.

What do you think the future holds for the independent information profession? What trends do you see that may impact us?

I think it's a wide-open opportunity for people. The Internet has been great for our profession, because it's raised awareness of the information that's out there. It eliminated some of the easy, slam-dunk projects that I had eight or ten years ago. Obviously, people can do those for themselves now. We see much harder projects, questions that people wouldn't have thought to ask five or six years ago, because they didn't think the information would be available. Now there's almost the opposite sense:

"Well, of course you can find a list of every volunteer fire department in the U.S. by tomorrow—for no money."

So there's certainly a greater demand for our services now, and I don't think that's going to go away any time soon. There's more of a demand for value-added services, which is fun, because that's a more "thinking" part of the job. I don't see that slowing any time soon, because the labor crunch is going to be around for a long time. We've got the Baby Bust generation coming up now, so businesses are desperately looking for people, and they wind up having to outsource a lot of this stuff just because they don't have enough people in-house to do the preliminary analysis of the information.

The toughest thing for people entering this profession to realize is that they have to have the research background. A week doesn't go by that I don't get an email from someone saying "I'm a stay-at-home person, and I have a computer, and I want to start making money doing research on the Internet like you do, and what do I need to do first?" It's hard to convince these people that they're not going to make a go of it without a really strong background in research. You can't charge your clients for your learning curve in this field. Right now, people who enjoy doing research can find a job in a company. But as the economy constricts, as it sometimes does, more people become interested in becoming independent information professionals, because it's harder to find jobs within organizations. The number of people who are doing this tends to fluctuate inversely with the economy, but I think it's certainly a wide-open field.

What advice would you share with somebody who is on a serious track toward the independent information profession?

I would encourage them to spend four or five years in a company doing research. Find an organization that lets you do a lot of different kinds of research, that lets you market your services so that you have experience explaining what value you can add.

Try to search a wide variety of professional online services like Dow Jones and Dialog on a daily basis, so that when you decide to go independent, you've already got that knowledge base. It's not a knowledge base that you can pick up on the job once you go independent. It's not even something that you can learn in a class. I took every online research class I could take in library school, and when I think of the kind of research I did for the first couple of years after that, I wince. It just takes time and daily use of these services to really understand what's out there and how best to use them.

I would recommend taking classes in entrepreneurship, in running a small business, and in marketing, and to plan several years ahead before you actually go out and launch your business. And I'd recommend meeting and talking with other, established independent information professionals. It really helps to find out what it's like in the trenches every day; that way, you can decide whether you think you'd really enjoy this kind of job.

Super Searcher Power Tips

- The first thing I did was contract with a graphic artist to design a corporate logo. I'm really glad I did that, because it enabled me to start my business looking established.

- There are very few research projects where I don't spend at least part of the time searching a professional online service. I think it's malpractice not to use them, because there is so much stuff in those databases that you can't find just searching on the open Web.

- I evaluate a Web site like librarians have always evaluated sources: Who's maintaining it? What point of view do they have? Do you recognize the brand? Does the material sound right, or does it sound weird? You look to see how frequently information is updated. If you find dead links, you tend to think it's less reliable.

- I started out viewing my speaking and writing mainly as marketing tools, because it's a great way of establishing credibility and developing contacts. Since then, they've become revenue sources.

- I never expect to get any business directly from my Web page, but it's sort of like a listing in the yellow pages. It shows a certain amount of credibility.

- It's important to be able to turn down a job. If you don't think you can do a splendid job, the worst thing you can do is take it on. At best, you'll barely manage to meet your client's expectations, and at worst you'll have a client who will tell fifteen other people how disappointed he is in your work.

- I have no employees. Never have and don't intend to. I work really long hours, and don't mind that. I keep all of the work in-house, partly because I like knowing where it all is.

- Clients are attracted to people who feel happy and successful. If you can avoid feeling desperate or anxious about your business, your clients are attracted to you in a way that they're not to someone who is nervous or scared about whether this is going to work or not.