Lessons from PricewaterhouseCoopers

by Doris Small Helfer
Sciences Librarian
Library, California State University, Northridge

PricewaterhouseCoopers LLP (a.k.a. PwC) announces itself as the world's largest professional services organization. It helps clients build value, manage risk, and improve performance by providing business services that include audit and accounting, human resource consulting, financial advisory, and management consulting services. PricewaterhouseCoopers employs over 140,000 people in 152 countries. PwC was formed earlier this year by the merger of two of the Big Six accounting firms — Price Waterhouse (of The Oscars, “The Envelope Please” fame) and Coopers and Lybrand. When organizations merge, changes are inevitable and the PricewaterhouseCoopers Knowledge Services organization has used the merger as an opportunity to reexamine all the information resources delivered to employees' desktops.

Although in this particular case a merger may have triggered PricewaterhouseCoopers' Knowledge Services to look at harmonizing information services delivered to in-house client desktops, sooner or later all corporate organizations face these same issues. Even prior to the merger, way back in 1993. Coopers and Lybrand's libraries started looking at key questions for all their sites: where information was bought, what information was bought, and what value the staff added. They also considered what information resources would help their organization.

Outside factors such as the rise of the Internet and the vast increases in information available directly to end-user desktops necessitated some of these changes. When looking at its clientele, Coopers and Lybrand realized how highly mobile they had become. People were rarely in their offices. A traditional, walk-in library could not serve client needs. Libraries which did not really add value for their users were eliminated.

The organization transitioned to a centralized help desk function that focused on desktop delivery to customers through an 800 number. Librarians did regular and specialized research, training, step by step online help, Internet site identification, and also worked on the intranet team.

The wealth of content that could be delivered to desktops greatly increased. They worked closely with vendors to make sure the vendors knew what they needed in their new online products. Frequently they helped vendors shape their products by serving as beta test sites for many new desktop offerings. And they became very proactive in telling vendors how pricing structures must change, if the vendors expected to continue serving Coopers and Lybrand.

Trish Foy, director of the Knowledge Services Organization for PricewaterhouseCoopers, is based in Stamford, Connecticut. Originally with Coopers and Lybrand, Foy was instrumental in leading many of the ongoing changes in Coopers and Lybrand prior to the merger. With the announcement of the merger, she immediately began consulting and communicating with her counterparts at Price Waterhouse. Synergies basically drew on the knowledge management activities both organizations had in process, though in very different organizational models. Still being hammered out is how the new unified structure will work, but PwC has focused not on turf issues, but learning instead about peoples' comfort and skill levels and how to move ahead to meet the strategies and objectives of the new firm.

The Knowledge Services Organization reports to the Chief Knowledge Officer. Prior to the merger although the companies had operations all over the world, they did not truly organize in a global fashion. The Organization is now going to a truly global organizational model. Libraries are no longer called libraries but Research Centres. Librarians have become Content or Research Specialists. The Organization currently has about 35 people with another five or six involved in ongoing implementation of bringing vendor products to the desktop.

Management from both organizations worked together to identify what groups and task forces they would need and who would serve on each group or task force. This will help deal with the important long-term issues faced by merging two different organizations with two different cultures into a consolidated organization. Each team has representatives from both Price Water-
house and Coopers and Lybrand. The entire information staff has proved receptive and ready to face major changes due to the merger.

In consultation with management, Trish Foy has identified issues the organization had not truly dealt with before, but which industry and organization trends clearly mandated attention now. Several new positions were created. Tish Andrewartha, based in London, England, became director of Knowledge Research Networks. Jill Maserian, based in Boston, became director of Global Content. Tish has the task of developing a large network of contacts that can serve a global community of researchers when and where needed. In addition to connecting people within the various lines of services with those they will need to form working relationships with, she's charged with keeping those relationships healthy enough to support the business process and to keep PwC on the leading edge. Some of those in the network are librarians, but that is not a criterion for inclusion.

Jill Maserian was hired shortly after the merger of Pricewaterhouse-Coopers and came onboard in her new job as director of Global Content around September 1998. Prior to joining PwC, she was director of Global Information and Research Services for Arthur D. Little, a smaller competitor to PwC. In her new position she harmonizes disparate information services and needs throughout the new organization. Although familiar with many of the same vendors from her days at Arthur D. Little, Jill has found the scope of the services at PwC much larger. She must pare services down to the right level for the new organization. Her first task involved ferreting out duplicative services. The merger brought to the fore the need to reevaluate services. Currently, she is familiarizing herself with the needs and present resources the PwC libraries deliver to the desktop by traveling to the many different organizations and identifying the individual needs of each part of the whole. In some cases the needs depend on geographical location (e.g., sites in Europe will clearly require resources with a more European slant, as well as some specialized tools). In other situations, the line of business will create special needs (e.g., the Legal Department requires specialized, in-depth legal information services).

Organizations such as Pricewaterhouse-Coopers which operate as a library network have an advantage over organizations in which each small library acts as a separate entity, especially when it comes to delivering online services. Networked library organizations such as PwC can negotiate with vendors for one global contract. Both libraries and vendors benefit. Instead of selling services by making individual sales calls to all the small PwC libraries throughout the world, vendors reduce their sales costs by dealing with one unified library network. Vendors spend less time writing and having attorneys look over each individual small contract. They can also find more uniform use of their products across an entire organization encouraged and supported by in-house information professionals. Pricewaterhouse-Coopers benefits by getting one consistent, best price offer and taking advantage of the increased negotiating power of a large, unified customer dealing with a vendor, rather than dealing with lots of small little customers spread throughout the world.

The whole PricewaterhouseCoopers experience teaches some vital lessons and important trends. PwC realized the roles, and yes, even the name of the librarian, must change to help management understand what research skills we have that the organization needs, particularly the ability to identify and apply the information resources the organization will depend upon. The roles librarians perform in PwC have changed as well. Several new positions have been created, one dealing exclusively with what content to deliver to the desktop, harmonizing vendor contracts throughout the organization, and determining the need for specialized local information. Another deals with the identification of the appropriate people resources needed and when and where to place them.

The roles and the titles of librarians or information professionals will change in a variety of different ways, as organizations identify their specific information problem areas. If we do not adapt with them, we cannot assure our survival in the organization. At least for those in large global corporations and companies, the days of separate little libraries scattered across an organization, each doing their own thing, have passed. Strength and benefits await libraries when they leverage their power by joining together as a network. The advantages vastly outweigh any benefits of autonomy, especially when the network understands and allows for individual site differences.

Information professionals need to tell their vendors what they want and need. PwC didn’t just complain it couldn’t get what it wanted from its information providers, they worked with vendors proactively to tell them what worked best for new end-user products and even the best types of pricing structures. PwC told vendors unwilling or unable to change their methods that failure meant the end of doing business with PwC. PwC played an active partner role with vendors in coming up with useful end-user systems.

Vendors who listen to their customers will succeed. Vendors can only sell products when the products supply needed information resources in a useable, convenient format at an affordable price. Systems that might have worked for librarians may not work as well for the everyday end user. We need new products designed with the end users in mind. But to get those products, we need to analyze our users’ needs carefully and communicate those insights and specifics to our vendors.