

USING THE TELEPHONE AS A RESEARCH TOOL

INTRODUCTION: THE OLD, THE NEW, AND THE USEFUL

In the information field, our goal is to solve each problem in the optimum way possible – most efficient, most complete, fastest, cheapest, most reliable, etc. In order to meet this goal, it's important to use the research tool, or combination of research tools, best suited to each individual situation. With the constantly expanding array of new technologies available, it's easy to forget the unique and important advantages of the telephone as a research tool.

This article asks you to reevaluate the usefulness of the telephone as a research tool and to consider reintegrating it into your research efforts.

In reevaluating the telephone, we'll examine questions such as:

- o Why bother with the telephone at all?
- o When might the telephone be your most appropriate research tool?
- o How does the telephone fit in with your other research tools?

By this point, you will, I hope, be reconsidering using the phone, so we'll continue with topics such as:

- o How to find who to phone
- o How to plan and make the phone call
- o How to follow up after the phone call
- o And (being realistic to the last) what to do if you still really detest the telephone

With this basis, let's begin...in praise of telephones.

WHY PHONE

The telephone has a number of advantages as a research tool. Here are just a few, to get you reconsidering.

It's interactive, direct and exact. Let's look at each factor separately, although in fact, these three interrelate.

Interactive – One of the best things about the telephone is that communication can be an immediate two-way street. If you're not sure you understand something, it's easy to say "Let me see if I have this straight. You're saying that..." And if you

don't have it straight, you can catch the problem and clarify it right there. You can keep modifying and refining as you go along – "How would a resurgence of tuberculosis change the situation?" You can keep expanding as you need: "Would this also apply to..."

Direct – With the telephone, you can, in effect, go to the source's mouth. For example, you can call the person who conducted a particular study. The answer you need may exist in the researcher's original data, even though it was not one of the published conclusions of the study.

Exact – With techniques such as on-line, library, or archives research, you can find information only on questions that other people have chosen to answer. With the telephone, you can find the answer to the exact question you need answered. I once needed to find the number of stolen rental cars involved in injury accidents in California from 1987 through the present. If you think that no database had that statistic, you're absolutely right. Speaking to experts directly, however, I was able to find the numbers that let us extrapolate the answer.

Want more (of the many additional) points in the telephone's favor? It's fast – dial the number, and there you are. It's immediate and as real time as possible – when you talk to someone, you are not getting information that was updated yesterday or last week. If something happened the minute before you called, or even while you're on the phone, you can be told about it. It's cheap – there is virtually no initial cost for equipment, the costs of calls even around the world continues to decrease, and special phone packages available from a number of carriers reduce the prices even further. Local calls and toll-free numbers save your budget even more. Almost everyone has a telephone and you don't have to learn any unique language, commands or codes to use one.

The rapid spread of fax machines gives yet another important dimension to telephone research. In the past, after speaking to someone on the phone, it could take days or weeks for documents that they had to reach you. Today, with the proliferation of fax machines, documents are in your hands in seconds.

I recently conducted a search for a tool or instrument that could identify the sizes of metal rebars that were totally encased in concrete. I didn't know if there was such a thing, let alone what to call it. Three local phone calls, two toll-free calls and 15 minutes later I had faxes in my hands with pictures, graphs, specifications, prices and explanations for a range of pachometers that could do the job to various levels of specificity.

Many of the points listed in the previous discussion are advantages, however, only in the right situations: Cheaper? – well sometimes... Faster? – that depends on what you need. The next section introduces the issues of when to phone and how to integrate the telephone with other research techniques.

WHEN TO PHONE

There are no hard and fast rules about when to choose the telephone and how to integrate the telephone with your other research techniques. As you proceed, you'll find the mix that works best for you. There are, however, some rules of thumb that you might find useful.

You can think of many of these as the "too" rules – for instance, "too" wide/complex/narrow/specialized/new/old. That is, the telephone is especially useful when your topic or desired answer is "too" something for on-line or library research to easily provide the answer, or the whole answer. Let's look at some examples.

Too wide/too complex – Using on-line sources, you might be able to find the effect of a drought on a set of crops for a specific country. You might not, however, be able to find the effect of that same drought on six specific crops in four neighboring countries. If you speak to an expert in the field, he may have that data at his fingertips, or be willing to think about it and actually synthesize the answer for you.

Too narrow/too specialized – "Stolen rental cars involved in injury accidents in California" was definitely too narrow, or too specialized. Data was available from traditional sources for example, on stolen cars, but not stolen rental cars. Putting the answer together required talking to people from several different disciplines in three states and two countries. Other examples might include information that applies only to a specific community, or area within a city, or a special subgroup, or that crosses several subgroups – single working mothers of children with disabilities. As the number of individual descriptors pile up (stolen -rental car - injury accident – California), remember to consider the telephone.

Too old/too new – If something just occurred today (or developed very recently) there may not have been time for all of the data to appear in print/ be included on-line. At the other end of the spectrum, on-line sources frequently go back only a certain length of time. In one search that related to the death of a doctor in Virginia, the on-line full text records for the Richmond Times/Dispatch went back to 1989, while the death occurred in 1962. I called the newspaper; they referred me to their research librarian; within the hour, she found and faxed the obituary.

In addition to the "too" rules, some inherent restrictions in on-line searching might make you consider the telephone. The inability to obtain visuals is one example of an inherent restriction.

For example, a DIALOG reference indicated that a relevant article contained a set of graphs depicting market shares. Unfortunately even full text did not provide these key visuals. I called the author's office and they were happy to fax me the visuals as we spoke!

Terminology is another example of inherent restriction or difficulty with on-line searching. In some cases, there can be many terms or names for the concept you want. Although you can use synonyms, and check thesauri or descriptor listings, if

you omit the exact term used in a particular reference, you may miss that reference. A person on the other end of the telephone is likely to give you the information, even if your terminology is slightly off (a good example of what the Doonesbury cartoon referred to as "user friendly live-wear").

If you don't know the name for what you want, you can also have a terminology problem. The pachometer search is a good example of this. I didn't know what the thing was called if it did exist at all. There are ways I could have searched using "rebars" and "measurements" among other terms, but being able to talk to a person and ask "Is there something that maybe does this and sort of does that?" was far easier for me. The telephone can always be a last resort. And using your "last resort" first can sometimes save you lots of time and aggravation.

As the previous paragraphs indicate, there are a number of ways to integrate the telephone with other research methods, including:

- o Use on-line to find relevant articles, then the phone to obtain the visuals.
- o Use on-line to learn the general facts on a topic, then telephone to find how it applies to your specific situation.
- o Use the phone to help define the terms or the problem, then use other methods to gather additional information.

The next section further highlights the interdependence of research techniques.

WHO TO PHONE

The big challenge is to find the first name and phone number to call. Once you have a single person to call, that person can provide the next contact and you're on your way.

There are innumerable sources for that first number. In this section we'll touch on some of the most common ones. If you want a more in-depth discussion of sources and procedures, you could send for *How to Find Who To Call* which is referenced at the end of this article.

On-Line – Begin with on-line research and go from there. On-line can provide you with articles that reference experts in the area you want. In addition, you'll know the author of the article and the name and location of the publication. Look up the phone number for the publication, and call the author. Authors are wonderful resources – they know the subject and are generally willing to talk. Authors are frequently gold mines of further information, such as phone numbers for people they referenced in their articles and additional references they never mentioned in the article.

CD-ROM – If CD ROM is available, that can provide a cost-effective means of obtaining reference names. For example, check the Social Sciences Citation Index

for relevant experts. This index even offers author addresses, if available.

Yellow Pages/Phone Books/Information – Because we're so used to having phone books around, it's easy to overlook them as a source for research information. In my pachometer search, I began with the Yellow Pages to find the number of a local very-full-service hardware store. Yellow Pages frequently have additional indices to help you find what you want. My local Yellow Pages, for example, has a Subject Index (Automotive, Health and Well-Being, etc.), a Brand Name Index, and an Alphabetical Index. The white pages are full of useful information such as phone numbers for libraries, government offices, and individual departments for local universities. If you need an expert in a given field, speaking to someone from a relevant department of the nearest university can be a useful starting point. For numbers in other towns, states and countries, your local library may have "foreign" phone books, or call the telephone information operator for that location. Toll-Free phone books can provide numbers that save your budget even more.

Directories – There are directories for everything – even directories. The Directory of Directories (now titled *Directories in Print*, sometimes referred to as the "DOD," Published by Gale Research Company) lists over "10,000 Business and Industrial Directories, Professional and Scientific Rosters, Directory Databases and Other Lists and Guides of All Kinds". The DOD has a title, keyword and subject index. The listing for each directory shows the publisher's name, address and phone number as well as information about the directory. It's a good bet that a publisher of the *Awning Manufacturers Directory* or of the *Who's Who in Canvas and Industrial Fabrics* could supply you with information in that field, or give you the name of an expert to call.

Associations – There are Associations for everything. In fact, you'll find the *Encyclopedia of Associations* listed in the *Directories in Print*. Geriatric Assessment, Dentistry, Education, Nutrition, Ophthalmology, Psychiatry, and Research each have their own association. Each association listing shows address, phone and the name of the key person in the organization along with their title (Pres, Exec.Sec., etc.). With a name, a phone number and a title, you're on your way. Some associations will only provide information to their own members, but all associations know other organizations or key personnel in their special fields.

Publications – Just like Directories and Association, there are Publications for everything. There are a number of sources for information on publications, including Gale *Directory of Publications and Broadcast Media*, *Newsletters Directory*, and *Periodical Directories and Bibliographies*. The *Standard Rate and Data Service (SRDS)* Publications are designed to present advertising rates, but for the researcher, they provide names, addresses and phone numbers for personnel on thousands and thousands of publications. You can find business publications, for example, organized by subject area and local newspapers organized by city within state.

These are just a sampling of resources for your first phone number, but we need to move on to "How to Phone".

HOW TO PHONE

There are a number of ways you could look at the phone call process, but for purposes of this article we'll break the process into *preparing*, *opening*, *interviewing*, and *closing*.

Preparing – In many ways, what you do before the phone call is the most important part of the call. If there's one single recommendation, it's **DO YOUR HOMEWORK**. When you call people and ask to take up their valuable time, there is a tacit understanding that you are not asking them to do your work for you – you've already done your work and are asking them for help where you need it.

Preparation may involve many things, including the following:

- o Do your preliminary research – find out as much information as possible on your own. If there are articles available, read them; if someone in your office has basic information on a topic, talk to them for background and terminology.
- o Clearly formulate your questions, needs, purposes for the call. Know and be ready to state in as few words as possible what you need and why you need it. Be clear in your own mind what you already know and what gaps you hope this person will help you with.
- o Have all your materials ready before you call. Nothing is so counter-productive as having to search for pen, paper, prepared questions, or other names you wanted to ask about while you have a contact on the phone.

I recommend preparing a separate sheet for each person you are going to call. At the top of the sheet, list the name, position/organization, and phone number, and where you located the number (especially if someone referred you, be sure to include that reference).

List the major questions and points you want to cover. You might consider an outline format, or just major headings; or use file cards or legal pads – whatever you find lets you be both most organized and most flexible during the actual interview.

Leave plenty of room for notes about each point as well as for other information that may surface. Have extra paper at hand in case your notes go on to several pages. As a suggestion, only write on the front side of each page. It's too easy to lose or overlook information if you're flipping from the front to back sides of pages.

Making the Call/ Opening – Ask for the person you want to talk to. Identify yourself and the purpose of your call. Let your contacts know you understand how busy they are and that you appreciate their talking to you. Here are some quick pointers:

- o This is the place where prophecy is most self-fulfilling. If you think of people as barriers between you and the information you want – they will be. If you realize that people are bridges between you and information, chances are, that's what they'll be.
- o Ask for help – that's what you are basically calling for. "Could you help me?" are among the most powerful words in any language. People actually want to help others – the secretary who takes your call, the reporter, the man at the hardware store.
- o Be flexible. Things will not always go as you expect. For example, if the people you want to talk to aren't available, ask when you might be able to reach them. Ask if there is someone else who might be able to help you. The person you weren't calling may turn out to be a prize resource.
- o As mentioned earlier, identify where you got this person's name. "I'm doing a research project on spring water and I read your article in the Times" or "Bob Smith at the Society of Geriatric Ophthalmology said you were the expert to talk to about..."

Interviewing – Each interview is different, depending on factors such as the type of information you need and who you are talking to. Again, here are some rules of thumb.

- o Have your questions/points organized in order of importance. Have at least your first question written out and ready to go.
- o Interact – listen to what the person is telling you with each response. Tailor each subsequent question based on all the previous interchanges in the interview.
- o Expand - always consider that "one more question". This is a hard one to define, but each time you get off the phone and realize "I wish I had asked...", you'll be honing your one-more-question skills.

Closing – In wrapping up a call:

- o Thank people for their time and information. Let them know you really do appreciate what they've done for you.
- o Review any follow-up either of you is going to do – "I'll send you a list of appropriate dates this afternoon and your secretary will send out the reports this week?"

- o If you need more information, ask for your next contact. "Who else might you suggest I talk to?"

Before we leave the telephoning process, I want to reinforce a few words that will serve you well throughout the process: **empathize, sympathize and appreciate**. Think of the people on the other end of the phone – they may be overworked, underappreciated, understaffed, or just having a bad day. Treat them with every bit of courtesy, respect and understanding you would want to receive. Let them know you appreciate whatever they can do for you – they are under no responsibility to put themselves out for you at all – so whatever they do, accept it as a gift. This is appropriate behavior on your part. In the long run, it also brings amazing results – from the secretary who tracks down her boss, or suggests another source, to the senior vice president who takes time to look up figures for you.

AFTER THE CALL

Once you've hung up the phone, there are still some things you could consider doing to do to complete the process.

Think about the phone call for a minute and review your notes. Clarify any of your notes that need it (maybe there were places where you were madly scribbling information, or other places where you wrote half a thought and then got caught up in the conversation). Notice if there were any one-more-questions you would have liked to ask. You may be able to call the source back, or ask the next person you call, or at least learn for future telephone interviews.

See what additional bridges you can now build from this phone call. Did the person with whom you spoke recommend other authorities? Or reference works? Or associations? How do you want to proceed with any of these? Remember, when you make these next contacts, you can say "So and So suggested that I call you," or "According to So and So, you're the major expert on ...". These personal introductions are incredibly powerful.

Perform any follow-up, whether it's faxing a memo, or perhaps sending a thank-you note. On some occasions I have sent a letter of appreciation or commendation to the supervisor of the person who helped me (after carefully checking with the person involved to make sure it would be appropriate).

At this point, you may have obtained all the information you need, or you may have to continue the process with another phone call or some other form of research.

However you proceed, having the telephone as an additional research tool increases your options and your chances for success.

If you still hate the telephone, or just want more help and direction, there's a final section just for you.

BUT I HATE THE PHONE...(OR AT LEAST I WANT MORE HELP)

Good news for those who hate the phone includes: You can learn and improve these skills. There are professionals who will do all or any parts of the process for you. There are more in-depth guides available to help you find who to call.

You Can Learn and Improve Telephone Research Skills

If you blow a phone call, nothing terrible happens. Pick up the phone and call someone else. Start with easy calls and progress from there. At a minimum, you can start by calling the information operator to find a phone number or determine an area code – and there's your first successful research call.

There is no one right way to do things. Be yourself (of course, your most charming and appreciative self) and find what works for you.

Information Brokers – Professionals Who Will Do It For You

There are professionals who will handle any or all parts of the process for you. They are called Information Brokers and they work for you on a project basis.

If you don't want to touch the phone, they can handle the whole process for you from finding the original contact to submitting the final report. Or they can help you with any parts of the process you wish – find promising contacts for you to call; make all the initial calls for you to locate the exact experts who are willing and ready to talk to you; do preliminary interviews; or just suggest resources where you might find good contacts on your own.

There are a number of ways to find an Information Broker to help you. Of course there is a directory for them – *The Burwell Directory of Information Brokers*. And, of course, there is an association for them – Association of Independent Information Professionals (AIIP). That association has its own Business Directory. And there is the telephone. You can call *Risa Sacks Information Services* at (510) 530-6154 and we will be glad to help you or give you the names of other AIIP members who might meet your needs.

Guide to Help You Find Who to Call

The guide *How to Find Who to Call* presents a more in-depth discussion and listing of resources to help you find the right people to call. To obtain more information on the guide, or to order a copy, see the reference at the end of this article.

FINAL WORDS

The telephone will not solve all your research problems, but it can prove a valuable addition to your research arsenal. Give it a try – information is only a phone call away.

REFERENCES:

How to Find Who to Call By Risa Sacks, *Risa Sacks Information Services*

For more information on the guide, call (510) 530-6154 or (510) 531-9086. To obtain a copy of the guide, call and order by phone or send \$5.00 to cover postage and handling to:

Risa Sacks Information Services
3838 14th Avenue
Oakland, CA 94602

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