

# SEARCHER

The Magazine for Database Professionals

A reprint from  
**SEARCHER**

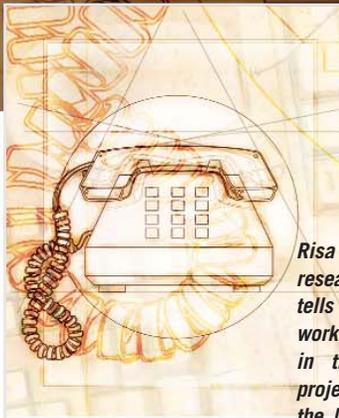


## PHONE SEARCH

The Search Goes On

**We've all had the experience** of putting a project to bed, and patting ourselves on the back for a job superbly done ... only to have the project resurrect itself and confront us with new challenges, new hurdles, new chances to think outside the box, and possibly new rewards.

And if you've publicly held the original project up as a little gem of research, how do all your lofty words hold up to the follow-up reality? Having let you in on a successful phone search experience in the March 2005 issue of *Searcher* ["Anatomy of a Phone Search: Primary Research Using the Original 'Online'"], I decided to invite you along on the follow-up projects getting to the final solution — "the search goes on."



*Risa Sacks, information researcher extraordinaire, tells how her phone skills worked to her advantage in the follow-up to a project she wrote about in the March 2005 issue of Searcher. Lessons learned we can all use.*

by

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## How It All Began

Like any good serial presentation (the current weekly soaps, or, are you old enough to remember the serial movies?), it's important to recap the main points, whether it's leaving the heroine tied to the railroad tracks or leaving the client with the information that action had not yet been taken, but might be in the offing.

In the original article, we were on the trail of international legal action that had disappeared from the press for 2 years. The European Commission had investigated an alleged conspiracy by three drug companies to fix the price of an essential ingredient. With the help of a wonderful librarian, an excellent reporter, and the new case manager, we were able to determine that the case was active; understand why no action had been taken (change in case managers); and conclude with a fair degree of certainty that no immediate action would be taken, but that fines would probably be imposed 7–9 months down the road.

In the original article, I sang the praises of telephone research and stressed the importance of developing good relationships with “the experts” who could help provide critical answers.

(Note: As with the earlier article, all names are fictitious to continue protecting my sources.)

## Round Two: The Follow-Up

Well, here it is 6 months later and the client wants an update. Having opened my mouth and touted the success of phone research so publicly, now I'll have to see if it holds up.

Would my contacts remember me? Would they come through again? Was all this talk of developing relationships going to stand me in good stead? Or would I end up having to eat my words?

## As Always, Homework First

As always, whether a new project or follow-up on a previous project, before going to the phones, I start with a quick online literature search. There was no point in calling my contacts without first doing my own homework. Nothing annoys an expert more than someone calling to ask a question whose answer they have just put online. And it's a huge waste of a contact's time to ask them about something that you could have found yourself. Use experts for the in-depth details that don't appear in print or posted on a Web site.

Having determined that nothing had appeared in print yet, I started with my source in the press. Jim Curtis worked in Brussels for a major news organization and had most closely covered the European Commission (EC)

in this case. During our earlier contact, I had found him both knowledgeable and helpful and had been able to share bits of information back with him. I truly thought he was great and had expressed my appreciation.

Six months is a fairly long time, but Jim remembered me and was as charming and helpful as before. He confirmed that nothing further was out yet on the case. Even confirming a negative is very useful. In addition, Jim had a “vague recollection” of hearing that this case might be resolved in the first half of this year. He wasn't sure if the “Statement of Objectives” had been issued and went on to explain what that involved. If I found any indication that the Statement had been issued, Jim was willing to tap his sources for further information.

He told me about a similar case that had recently come to a conclusion after a long period of seemingly no activity. He even e-mailed me an article relating to the other case and to Commission procedures in general.

Both Jim's input and the article provided new insight into Commission issues — the new commissioner who was taking a hard line on price fixing, statute of limitations issues relating to fines, and the slowing down of Commission procedures by a vast number of leniency applications following a new ruling.

As a final comment, Jim said he felt that if the case weren't settled by the summer, the case manager's reputation might suffer.

## Back to the Primary Source

Feeling back in the loop, I proceeded to call my contact at the EC, Chris Bryalt, the case manager for this issue. Chris also remembered me and was equally charming. I was really on a roll — batting 1.000, and giving myself tons of credit, conveniently forgetting the huge elements of luck and timing that can affect any phone project.

Chris said that there was no decision out yet, then added that it “was a case of getting it out the door.” This was one of those truly significant comments that may be just mentioned as an afterthought, but can make the whole phone call worth it.

Chris also clarified that neither the leniency nor statute of limitations issues affected this case. We discussed the general timing of the case — Chris opined that this had, in fact, not been the swiftest case through the Commission, citing three case managers as a major factor in delay. He explained that until the Statement of Objectives was made public and the final decision reached, decisions about the amount of the fines and 90 percent of other matters would also remain unpublished. Unpublished parts would include material redacted as sensitive, such as manufacturing procedures and company structure issues.



A time delay would occur between when a decision was reached and when it was published on the Commission Web site, but Chris couldn't tell if that lag would be for weeks or months. His final comment was that the Commission was in a "wait-and-see" mode on this case for now.

While still without a definitive information on a specific timeline, this felt like success. The information from multiple knowledgeable sources concurred. There were indications that the case was progressing, possibly entering final phases.

Always conscious of keeping good relations with the press and continuing to build alliances, I handed the information I had found back to Jim. He was glad for the input and said he'd keep his ear to the ground for any more signals.

With great pleasure I sent off the update to the client, who was delighted. I celebrated another job very well done. Strike up another win for phone work. "Oh joy! Oh fabulous researcher!" I congratulated myself. Oh ... don't tempt fate like that — there is no better way to guarantee that the next assignment will take you down a peg.

## The Final Round

Two weeks later, a new e-mail arrived from the client. They had found a posting on the Commission Register of Documents listing some form of administrative decision on the case. Was it the fines and final decision information or merely a lesser procedural matter? The client had put in a request for information, but receiving the documents could take weeks, and a critical teleconference with a judge relevant to a case of their own was scheduled in a few days' time.

Could I swing into action again and see what I could find? Could I "scoop the case for them" and get the documents more quickly? Or find out if it was the resolution or just a bureaucratic procedure?

Sure — no problem. I had just spoken with my contacts weeks before, so relations were current and good. There had actually been a public posting of some sort. And I was, after all, this brilliant phone researcher.... You can already see where this one is going, right? We've looked at the joys and benefits of phone research, now we get to focus on the trials and tribulations.

## Your Source Is Gone

I shot off a quick e-mail to Jim — if anyone would know, he would. Hours later there was still no response and it was getting close to close of business in Brussels.

This highlights one of several trials of phone research, as compared to online searching. First, you can't count on a response within any specific time

frame. While computers get viruses, people get viruses, flu, vacations, meetings, and maybe even deadlines of their own that can trump any request of yours. And while computers are available 24/7 (except when they're down for maintenance or any of a host of other problems), people live and work all over the world, in different time zones. They even leave work and have a life outside, no matter how urgent your own need may be. So doing phone work poses the extra requirement of watching the clock to know when someone will likely show up for work in Los Angeles or Paris or Moscow — and when they are likely to be out for lunch or leave for the day. (That said, I have had incredible experiences, for example, e-mailing Australia and getting a response at 3 a.m. their time. But you can't count on all your contacts having trouble with a bout of insomnia.)

Ideally, you have a plethora of sources in disparate geographical and time zone locations, so you can "phone your way around the world" following the clock to get your answers. But sometimes, quite frequently, in fact, a small pool of experts are all concentrated in one location.

If you can't quickly reach a critical source, you have to carefully consider how much of a nudge to be. Will following up too soon alienate the particular source? Will waiting too long just prove fruitless and put you in more of a bind for getting the answers? In Jim's case, I knew that he might be on deadline, but also knew that just before close of business was not usually a deadline time for him. I was also banking on my judgment of him and of our relationship when I decided to give him a call.

Someone else answered Jim's phone — already not a good sign. Jim had just left for a new job with another major news organization. He'd be based in Paris, but wasn't due to report to work for another few weeks. Rats! Blast! (OK, expletives deleted.) There simply was no current phone for him. I explained the situation, but, at this point, no one else on staff was covering the topic.

Jim's colleague took pity on me and gave me a possible personal contact e-mail. A deciding factor in releasing that information may have been how knowledgeable I was able to talk about the work Jim and I had done and about Jim himself. That's another good example of how valuable the few minutes you spend just shooting the breeze and developing personal relations can be down the line. And now I had Jim's colleague as a contact as well.

Figuring I had nothing to lose, I sent off an e-mail into cyberspace. A few minutes later, there was a response from Jim at 7:25 a.m. his local time! Over a cup of coffee, getting ready for more packing, he took time to let me know that I'd found him, he was glad to hear from me, would put out feelers, and report back what he heard. His final comment was, "It sounds like



something had been decided and you've stumbled on the smoke signals."

With that line of research in progress, I was ready to call Chris and see if going directly back to the source would work again.

## Your Source Won't Talk

I got through to Chris easily and asked him about the posting and the case. Uncharacteristically, Chris absolutely wouldn't talk. All he would say is that he "couldn't comment on the case at all at this point in time." It was the most adamant he'd been in any conversation we had ever had.

How to proceed? That brings up another issue unique to phone research. You never have to decide issues of emotional approach to your computer. With people, however, you need to gauge how much and when to push and when to back off. Will pushing the limits gain you anything? Will it blow a source so badly that you can't use him again? Is he just busy or having a bad day? Or is he constrained by outside factors?

Keeping good relations with Chris was paramount and, in my experience with him, he'd always been as open as he could be. So I backed off, telling him that of course I understood perfectly and that I'd never want to put him in any awkward position. Could Chris suggest any other way to access the documents? Was there anyone else who might be less constrained in what they could discuss? Chris had no other suggestions, but at least I had explored every avenue I could think of.

I hung up and paced in frustration — so close and yet so far. I felt totally stymied and the clock was running.

## Back to Basics

Time to think outside the box again and review every possible source. Sometimes going back and reviewing everything you've done or thought can bring new avenues to mind. And there she was — my fabulous librarian from months ago when I had begun my first calls.

"Madeline" was the librarian at the EC Delegation library in Washington, D.C. She was the person who had provided me with the original name and number to call in Brussels for this case. She found the information I needed then in minutes and had cheerfully provided a wealth of additional information about more search avenues.

Back I went to my original source. As with the other contacts in this project, she remembered me and even remembered the specifics about the case. (Don't you love librarians?!). In fact, she said, the press release about the case had literally just come over the wires to her office. The ruling had been officially issued and she offered to e-mail me the direct URL and even do more checking for

me. She came back shortly with the information that the complete document set was not yet posted and provided the best URL for checking each day.

With a huge sigh of relief, I opened the e-mail and accessed the press release and the available details on the ruling and fines. We had the critical information in hand.

Minutes after that I got an e-mail from Jim saying he was a bit out of the loop "at home and drinking coffee and listening to Schubert ahead of his move to Paris." However, a friend of his had just called to say the EU had taken a decision on fines this morning and posted a press release. He was sorry he hadn't been able to flag the date of the release earlier and asked me to keep him posted on any other European case I might be following.

## Back to the Source as Conditions Change

Armed with this knowledge, I called Chris back to tell him that the ruling was officially out and to ask him if he could now comment further. Usually, I would not re-contact someone so soon, but the situation had actually changed on the ground, so it was fair to try this source again.

Chris had just finished reading the press release himself as I called and was now much freer to discuss the case. It was only during that time between the writing of the release and its publication to the outside world that he was totally constrained.

A case summary would be published in the Official Journal in all languages. That would be about a five- to six-page document and Chris wasn't sure of the time frame — perhaps within the next month or two, possibly sooner.

Chris detailed the processes required before the publication of the full case on the Competition Directorate's Web site. This included a confidentiality exercise in which all parties involved would have an opportunity to redact competitive business information relating to their own companies. Then would come a negotiating process until all redacted material was agreed upon and the remaining material published as the case report.

I thanked Chris, congratulated him on the successful conclusion, and asked if I could call him back for any further questions. Because I had been willing to honor the limitations he set earlier and work within his comfort level, we had maintained a good relationship and he was perfectly happy for me to call in the future.

## Conclusions and Evaluation

I fed the latest information back to Jim to close the loop. He told me that he'd let me know if anything else

# LESSONS LEARNED

Here are some final thoughts from this set of experiences:



1

## Get wiggle room in your schedule when possible.

Phone research takes time. Because you depend on other people with their unknown schedules, short time frames are particularly tough. If it's a tight schedule, let the client know the possible implications.

The last stage in this project provided a good example of racing the clock, which increases your chances of not being able to deliver for reasons beyond your control.

Unlike online research, you can't pull an all-nighter with phone research or catch up on the weekend making business calls. It may be a case, as has happened to me, in which all the top experts are unavailable at the same time — yes, the worldwide tungsten conference is in Beijing this week, and every major tungsten expert in the world attending. Then you can either go to experts the next level down or wait to get up-to-the-minute, hot-off-the-press information the following week — or some combination of the two. Educating your clients on the intricacies of phone research can be a major challenge, when all they want is “a few quick phone calls!”



2

## Build relationships.

When you are interviewing experts, you are also developing relationships. It's those relationships that allow you to call people back and to gauge how to interact with them — when to push, when to back off. It's those relationships that influence them to e-mail you the article, forward the URL, or take time from packing at 7 a.m. to check with their colleagues for you.



3

## Don't burn a source.

In general, respect a source's limits. Don't push those limits if it means alienating a source (Caveat: This rule, like all rules, will have times when you should break it.) Don't call a single source back too soon or too often — again, with a caveat that if the external situation materially changes, it may give you license to call again sooner.



4

## Go the extra mile.

Get back to a source with new information to share; forward the interesting article; remember to ask about something from a previous conversation. Do whatever it takes to show that you value them and their help. That extra mile you march today may stand you in good stead 6 months down the road.



5

## Use time zones to your advantage.

Be aware of time zones and use them to your benefit. If it's 5 hours ahead or 3 hours behind, keep that in mind as you plan your calls.

When it's noon on the East Coast and people tend to go to lunch, it's start of business on the West Coast and you may just catch someone before they go into the day's meetings.



6

## Get a wide range of contacts — both geographically and institutionally.

This increases your chances that at least some will be available and expands your calling day.

If one contact is in government, get others in the press. If many contacts are in Belgium, a contact in D.C. can be a lifesaver.



7

## Think outside the box and review.

When you've run out all your options, take another look to see if there's one you can tap again or another avenue of approach.



8

## Remember to use the phone.

I know the message is redundant, but don't forget the incredible usefulness of phone work to get you answers that go beyond online.



surfaced once he started his new job in Paris, and asked me to let him know if there were any new European cases that I ended up following. Lovely — now I had a good contact at a new organization in Paris, as well as Jim’s colleagues at the old organization in Brussels. It was definitely worth the few headaches to end up with a wider contact network.

The client was completely pleased with the results and with their timeliness. And phone research had saved the day again, so I really could take you along for the successful conclusion.

One benefit (or drawback, as the case may be) of ongoing projects is that you get to evaluate the accuracy of your earlier projections. Were you in the ball park or totally off base? (Or is the baseball season here in Boston coloring my prose?) Was the information you provided actually of use to the client?

In this case, happily, we did well on both scores. Back

in June we’d predicted resolution in 7 to 9 months with large fines being levied. Seven months later, in January, the next projection was “in the first half of the new year,” and indications were that the project may have moved into a new phase. Two weeks after that, there it was — the resolution, including heavy fines that we could detail just in time for a critical judicial teleconference.

In this case, at least, I didn’t have to swallow any of my earlier words. Again, the combination of online and offline research provided a more complete solution than either one alone could offer. ♦

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**Risa Sacks** provides primary research to companies, research departments, and researchers around the world. She is author of the IT book *Super Searchers Go to the Source*. For excerpts of this and other publications, please see <http://www.RisaSacks.com>.