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Managing Vendor Relationships

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Abstract

Libraries and vendors are all too often trapped in the paradigm of swapping content and services for dollars. Pivoting from this transactional model, this preconference panel of one moderator and five speakers explored the following questions: How can librarians and vendors work together to develop better products and services? What can impede these relationships? What are best practices for collaborating effectively and ethically? How can everyone build, negotiate, and sustain these relationships for mutual benefit? And when conflict inevitably arises, how do we deal with it? This preconference featured perspectives from two vendors, three libraries, and one consortium, based in the United States. Each speaker shared stories illustrating principles and practices of good and bad relationship management. Subsequently the speakers facilitated group discussions and answered questions, including several questions that attendees shared in advance. Successfully managing relationships among libraries and vendors is vital because these relationships enable and sustain collaborations, aid negotiations, and mitigate discord.

Stages of Relationship Development

Jason Chabak, director of Institutional Sales and Business Development at ReadCube, focused on the life cycle of a productive relationship, likening it to the stages of human development. He reiterated a point made by Jones and Cronk: business relationships are nonexclusive, and both parties should recognize the variety and complexity of the other's relationships. Educating oneself about context (company, industry, personnel, trends, challenges, etc.) is valuable background for developing a relationship.

During the awkward adolescent phase of a vendor relationship, when both parties are figuring out how to work together, perspective and expectations are paramount. Both parties have a job to do and should be courteous and honest as they go about doing it. They should do their best to respond to e-mails and phone calls in a timely manner, but also be realistic and understand that things can take time. The adage "it's not personal; it's business" applies, though creating a base of rapport helps build trust. Both vendors and libraries should view every project as a collaboration, with clearly identified role players and clearly defined and managed goals and expectations

from the start. In such situations, though conflict will inevitably arise, it can often strengthen the relationship.

Moving on to the adult stage of a relationship, Chabak stressed that partnerships should grow over time. Vendors exist thanks to renewals and not just new business, so they must collaborate with clients to ensure that the vendors' products are working and are developing in the right directions to meet client needs. A successful first collaboration lays the foundation for future success, as the parties have worked out many of the kinks and have familiarized themselves with the players and their strengths and weaknesses, which makes processes more efficient. Chabak also emphasized that both vendor and library representatives change positions and transfer their knowledge and relationships to other organizations, in many cases affording a head start on both sides of the table.

Finally, vendors and clients should eschew an "us versus them" mentality. They should take time to understand one another, exist in reality but strive for ideals, communicate early and often, step outside comfort zones to form innovative partnerships,

negotiate as necessary, and never be afraid to ask. Any worthwhile relationship takes work.

Deconstructing Myths about Each Other

Lindsay Cronk, head of Collection Strategies at the University of Rochester, walked the audience through "myths" that libraries and vendors hold about each other. Regarding library myths about vendors, she called out the assumption that all vendors are created equal and are the enemy, observing that vendors run the gamut from small nonprofits to for-profit megalodons. She called out the problematic myth that representatives are the human embodiment of the vendors for which they work. Vendors are human beings and frequently are former librarians or other professionals committed to the work of scholarly communication. Vendors do not usually spam libraries either; they reach out to libraries as part of their jobs, and good vendor representatives will do their best to learn their clients, share products that might align with client needs, and take no for an answer.

On the other hand, vendors also hold certain myths about libraries. Many believe that a smoothly delivered presentation will persuade librarians to acquire a product. The fact is that librarians care about content, relevance, and user experience, not about the pitch. Libraries get end-of-year money once a year, usually before the close of the fiscal year that typically falls in June, so a vendor offering end-of-year deals in December may be wasting everyone's time. Most librarians do not appreciate unscheduled phone calls or drop-by office visits, which interrupt their workflow and do not give them time to prepare, so vendors should try to schedule interactions whenever possible and respect librarians' time. Finally, pitching a product as an out-of-the-box solution to any library's needs is fatuous as most products and services require customization to meet local needs.

Vendors and librarians are all in scholarly communication operations and need to have a conversation. According to Cronk, vendors should cultivate sales forces that understand technical concerns, provide humane licenses and more transparent pricing, invest in online platforms and user experience, address unsustainable pricing inflation rates, and embrace libraries as partners, not just as customers. On the flip side, librarians should strive to have meaningful conversations with their vendor representatives and leverage vendors as an extension

of their workforces. Librarians should develop principles-based criteria and user experience assessment for resource review, educate faculty about the information economy, and get a handle on where institutional spends are going.

Usergroups and Product Development

According to Allen Jones, director of Digital Library and Technical Services at the New School, usergroups for Ex Libris software emerged in the late 1990s as groups of systems and technical services librarians gathered to trade experience and knowledge for more efficient systems administration. These groups tended to be product-based and regional. The first Ex Libris Usergroup of North America (ELUNA) conference was held in Knoxville, Tennessee in 2006. Its international sister organization, IGeLU, or the International Groups of Ex Libris Usergroups, similarly started as regional usergroups and now encompasses 470 institutions globally. These self-governing, customer-driven organizations advocate for members in product development, conduct enhancement voting cycles through product-based working groups, and provide networking opportunities for Ex Libris customers through conferences and product summits. The group has also grown to include engagement opportunities between library and vendor developers through joint, dedicated developer days and hackathons.

The hallmark of these usergroups is the close relationship between business and product development staff within Ex Libris. Throughout most areas of the company, individual customers and working groups are consulted on business, support, and communication strategies. For example, in 2014, 10 usergroup members joined Ex Libris discovery and ILS product management on a company-wide hosting strategy change from the deployment of locally hosted software to the cloud-hosting of multitenant systems. After deep discussions of use cases over the benefits of cloud-hosting vs. continuing to build locally hosted software, Ex Libris created a new framework for discovery interface customization (the Open Discovery Framework) and continued to build a robust API structure to support deeper search engine integration. Feature development for Ex Libris products is agile. The working group develops user stories, Ex Libris allocates development resources and builds those features, and both vendor and working groups come together for an after-action review during the annual conference or via remote meeting. In 2018, a similar summit was held to discuss new directions for

the Primo discovery product. This relationship is very dialogue-based.

A unique aspect of the company-usergroup relationship is the collective software development agreement: a legally binding arrangement between Ex Libris and both usergroups that outlines a community-driven enhancement framework. The annual conference of each usergroup sets a shared stage for discussion of product updates and face-to-face networking between customers and contacts from many levels of the company—not just sales teams, but developers, support staff, project managers, and business team members. The conference is an immersive learning experience for all.

When workshop attendees asked if members of the working group received financial discounts into the product and product strategy, Jones suggested that while working group members did not receive monetary discounts, the benefit of collective influence in the product development process was a larger benefit than any financial incentive. Libraries should no longer view their vendor relationships from a strictly client-service model where content/functionality flows one way—from active developer/vendor to passive recipient/client institution. Rather, vendor engagement is cyclical—much more relational and agile than it has ever been. This cyclical interchange requires institutional and consortial investment in other resources besides money to work with vendors, sometimes even having institutions as development partners, investing time, creativity, and talent to achieve institutional goals. Librarians should not see vendor engagement as an add-on but as an integral part of their jobs, and allocate time accordingly. This approach is important for vendors too, because when relationships break down, clients look elsewhere. Open source projects or changing vendors are a direct result of vendor relationship breakdowns and are not just pet projects of libraries with developers.

Vendors do not magically know what a library wants/needs, and there may be competing feature requests from other customers. Librarians should write user stories and ask sales teams how to get these into development. Participating in usergroups means that vendors hear the same message from a large number of libraries instead of slightly different stories from hundreds or thousands of libraries. Customer engagement platforms now include the Ideas Exchange (https://ideas.exlibrisgroup.com/), UserVoice (https://uservoice.atlas-sys.com/), and Ideas (http://ideas.proquest.com/). Use them!

Librarians and vendors are often equally frustrated trying to figure out who to talk to within each other's organizations. A way to minimize confusion on both sides would be an area on the library website outlining rules of engagement for software and content vendors as well as the library's procurement processes. Additionally, a compatibility chart mapping the library's product requirements would go a long way toward a vendor's understanding the customer's content and discovery ecosystem.

Negotiation Principles and Practices

Christine Stamison, NERL consortium director, deals with vendors daily, learning about new products, seeking customer service, or negotiating licenses for electronic content. She shared principles and practices she uses for managing vendor relationships.

Keep lines of communication open. Librarians should learn about their vendors and products and build a good working relationship. How can this be done? Start by taking vendor phone calls, within reason. A good rep will e-mail first to gauge a good time.

Spend time with vendors at conferences, especially before the end of a contract period. Find out what new services they offer. A good rep will reach out to clients to keep them updated. If they do not, follow up. Many vendors also offer webinars throughout the year showcasing new products. Many are recorded so librarians can view them at their leisure.

Understand vendors' organizational structure and customer service. Many companies utilize multiple contacts for customers. There may be one for customer service, one for financial issues, and yet another for technical issues. Know all of them and use them to your advantage. Ask for an organization chart from the vendor. If libraries are not getting the service they need, find out who is in charge and go to the next level. At conferences ask to meet the people who oversee sales and customer service and start building professional relationships with them. If service is falling short of expectations, insert a service-level agreement into the contract. For example, libraries can stipulate to have all urgent requests answered within 24 hours and standard requests within 72 hours.

In a good relationship there should be no surprises from either side—library or vendor. This is especially the case when negotiating new licenses. From the library perspective, leave plenty of time for license

negotiations, especially with larger publishers. Determine the most important terms and conditions before beginning negotiations; also have a list of "nice-to-have" items. Before license negotiations begin, all parties should meet. Ask for a decision maker from the vendor to attend all meetings. Have a frank discussion of what has worked and what has not, and be specific. Before meeting with the vendor, the librarians should do an inventory of the old license and decide what needs to be added and what can be removed. During negotiations there may come a point when the library will also need to know when to "fold 'em." On the flip side, vendors should notify libraries as soon as possible if seeking to impose any new terms and conditions in licenses.

Keep it civil. Remember, just as librarians talk to one another, so do vendors. Librarians should not demand a lower price by disparaging the value of the content. If the content were bad, the library would not be negotiating for it. Do not walk away from a deal if not truly intending to stay away. If the library returns to the table after vowing to walk away, that library has lost any leverage it had. Stay cool and speak facts; leave emotions out of it. Stick to the initial game plan. Lastly, if a librarian truly wants to make changes at a vendor, find out if the vendor has a customer advisory board and try to join it.

Transparent and Responsive Communication

Kimberly Steinle, Library Relations and Sales manager at Duke University Press, has been with the press for over 15 years, happily working with librarians throughout that time. Library relations team members communicate with, advocate for, and sell to libraries worldwide. They support the mission of the press to ensure that its content is distributed as widely as possible and its brand is known and recognizable across the globe. While Steinle acknowledged that they do have a vendor/customer relationship with libraries, they also see librarians as partners and not just a sales target.

The press does its best to adhere to the following principles of communication. Many of these seem fairly basic, but they have served the press well and might help others.

- *Transparency*. If vendors make a mistake, they should be upfront about it. If they cannot satisfy a request, they should explain why. For example, if someone asks how

pricing is calculated, the press is happy to share this information.

- *Responsiveness.* Prioritize customer or vendor queries, even the hard ones. It is fine not to have an immediate answer, but it goes a long way to acknowledge an e-mail and provide an estimated response time.

- *Honesty*. Honesty goes hand in hand with transparency. If a vendor cannot accommodate a customer or vendor request, be honest and do not ignore the email. Steinle has had to give bad news, for example, about extended delays in posting online content, and while it is not fun to give people an answer with which they will be disappointed, at least she is providing the information she has.

- *Collaboration.* Work with customers to understand their situations. If the library has to cancel a subscription, find out why rather than pressuring them to renew. Additionally, publishers and vendors should participate on industry committees to show they care about libraries and not just about sales.

- *Share information*. Vendors should share the information they have, rather than not communicate at all. Again, even if the information may not be welcome, it is important to reach out to customers. Steinle has had librarians tell her that they would rather know that the vendor is aware of a technical or access problem and is working to fix it. Without this communication, librarians may assume the vendor is not aware of the problem and will waste time contacting the vendor about it.

- *Welcome feedback*. Listen to customers, both when they are satisfied and when they are not. Listen to understand. Act on feedback and if action cannot be taken, be honest and transparent about why. Duke University Press relies on feedback from its library advisory board. Learn about a problem or challenge area before doing something (e.g., launching a new product) rather than having to deal with questions after the fact. Feedback improves product offerings, so welcome it.

A case study for the press in using these key communication principles was during its platform migration. The press moved platforms in November 2017, and

team members began communication with customers in early 2017. They utilized their advisory board, provided regular updates, and created a migration website and checklist, among many other steps. They invested a huge effort into the migration and communication plan, but they still forgot things and sometimes fell behind schedule. But they communicated with customers regularly. When launch of the librarian administration tool was delayed, or when content was kept open for much longer than originally intended, they let librarians know as soon as they knew. While some customers were not pleased with the delays and problems, team members felt that they needed to share information rather than let libraries discover problems for themselves. Steinle encouraged other vendors to do likewise and to remember these principles in any vendor/customer engagement.

Steinle asked the press's Customer Relations and Library Relations teams what they wished librarians might do differently. Team members wished librarians would tell them what they can do better. The teams may not be able to take immediate action on ideas, but they can listen and bring these ideas to others at the organization to prioritize how team members spend their time. They also want the most up-to-date information from libraries, including IP addresses and contact information. It is a bit embarrassing when team members e-mail someone only to find out that person retired years ago! They rely on their library contacts to distribute important information to the right people. And they want librarians to call them right away regarding any problems. They can often solve an access issue over the phone, and they would rather know about an issue promptly than hear from a frustrated librarian who did not reach out until the issue became a major problem. They value relationships with librarians and always look forward to feedback.

Conclusion

Fundamental takeaways from this session included a sense that vendors and libraries are interdependent and must become more engaged and transparent with one another. Cronk said that libraries and vendors are all in the business of scholarly communication and need to work together to move the industry forward. Stamison emphasized civility, communication, and predictability during negotiations for licenses. Jones highlighted the power of customers speaking with a collective voice to influence product development. Chabak recognized the variety and complexity of vendor relationships as they mature. Steinle called out the value of honesty and responsiveness to customers even in difficult circumstances. Good relationships take work on both sides—vendor and library alike.