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Pitch Perfect: Selling to Libraries and Selling Libraries to Nonusers

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Pitch Perfect: Selling to Libraries and Selling Libraries to Nonusers

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Program Background

Every business, every organization, every institution is ultimately judged by its ability to attract a following. This is true for stores, universities, religions, political parties and politicians, Broadway plays, athletic teams, and, yes, libraries. At the end of the day, whether they are funded by voter ratified millages, government entities, corporate sponsors, or tuition dollars (via the provost), libraries derive their needed funds because end-users—or their third-party surrogates—perceive them to add value to the communities they were established to serve. A library could have a great collection, perfect catalog records, and a well-trained reference staff—all housed in a beautiful facility—but, if it is underutilized, its value is diminished to a point at or approaching zero. Obviously, the staff of our hypothetical library has worked hard to create a pleasant, orderly, and productive environment, but the ultimate measure of its success will be determined by the value returned to its user—and funding—community. Having good products and services is an important baseline, to be sure, but getting folks to take advantage of the resources being made available is potential value realized; value not realized being no value at all.

The greatest challenge faced by any business or institution is not thinking up good ideas for products or services, or even getting those goods and services into production mode. The greatest challenge is getting market traction, both by drawing attention to what is being offered, and getting a target market to act upon the information (marketing, education, promotion, etc.) being disseminated. Toward this end, the point of this program is to consider the elements of a successful library outreach program with a special focus on the context of larger academic libraries.

Most academic libraries, and their library directors, have long ago recognized the need for more and better outreach to campus users—faculty and students alike. That recognition, however, has not necessarily resulted in successful action, or even a clear notion of what constitutes success in developing a library outreach program. While most large academic libraries have encouraged their subject specialists to act as "liaisons" between the campus library and academic departments, the goals of these liaison roles typically lack specificity so as to be measurable in a meaningful way. Furthermore, liaisons are most often not recruited for traits that would optimize their chances of success, assuming that success here would connote an uptick in library usage. Not only are the backgrounds and skills needed to succeed in outreach roles most often absent from librarian job descriptions, the liaisons, once hired, are rarely, if ever, trained in strategies that enhance their likelihood of success; nor are they are managed in a way that rewards success and corrects failure.

This conference program looks at the elements for mounting a successful library outreach program and draws upon insights from how the information vendor community manages sales to libraries and campus faculty. The presenters are a mix of librarians managing liaison programs and sales managers representing commercial publishers/vendors. We believe there are parallels between the efforts of these two communities, and that libraries would be well served by recontextualizing aspects of their outreach efforts from an educational program to a sales program.

David Celano

Dave spoke to the traits that he looks for in recruiting sales personnel. Desirable attributes included: appreciation for the academic enterprise—both research and instruction; good

conversationalist—both articulate and a good listener; motivated by short-term incentives, but sincere about representing the longer term mission of the company; and driven to achieve goals. Dave summed up this discussion by quoting a fellow hiring manager with whom he shares a similar recruitment philosophy: "I'm just looking for someone with good sense."

Beyond recruitment, Dave touched on the role of sales managers in retaining talented sales personnel. The factors that keep account managers in these roles include: sales success; a broad network of contacts, both internal to the company and externally in the market being served; and opportunities for advancement or income growth.

Dave concluded by noting that recruiting, developing, and retaining a sales force takes time, thought, and intentional organizational structures to optimize sales revenue, employee satisfaction, and customer satisfaction. It is important to recognize that very large and complex companies and organizations are judged, first and foremost, by the interactions that sales representatives have with customers, so it is imperative that these relationships be carefully and continuously managed.

Melissa Loy-Oakes

Melissa noted that the qualities she looks for in account managers include: being personable with good relationship building skills; being an active listener who asks thoughtful questions; possessing planning and organizing skills; understanding an institutions decision-making process and helping customers to make a successful case for a wanted product; and a demonstrated commitment to follow-up and responsive service.

Beyond the traits of individual sales representatives, Melissa spoke to the organizational structures required for successful sales management, including initial and ongoing training; maintaining channels of ongoing communication among sales representatives, as well as between the sales division and product managers and marketing staff; and structuring

organizational support for sales representatives, and, in turn, ensuring that sales personnel understand the company's goals and longer-term strategies for success.

Melissa followed up on this discussion of desirable individual and organizational characteristics that lead to sales success by touching on tools such as Salesforce.com that help manage various aspects of a sales program. She focused in particular on some of the functionality of the Customer Relations Module of the Salesforce software, not so much to highlight its functionality, but to underscore the needs of managing customer relations.

Marianne Ryan

Marianne acknowledged that most academic libraries were trying to transition to more outward looking programs to build stronger campus relationships, but that the effectiveness of these programs have too often been encumbered by such limiting factors as deference to those supporting bygone library models; hiring practices that prioritize subject expertise over relationship building skills; limiting outreach responsibility to a few staff members whose outreach roles are a relatively small proportion of their overall job descriptions; struggling to clarify expectations or manage accountability; and, most generally, being reactive rather than proactive in forging campus relationships.

Marianne then talked about some of the efforts taking place at Northwestern and elsewhere to broaden outreach opportunities with campus constituencies and ways that hers and other libraries were seeking to support the efforts of department and campus liaisons. Most importantly, she highlighted the need for library and campus leaders to identify real needs that can be met—and real goals that can be achieved—through heightened levels of interaction and engagement. For liaisons to succeed at building individual relationships in support of research and instruction, library directors, deans, and department chairs have to forge relationships that underscore the value of the library in the overall work of the university.

Mark Sandler

Mark attempted to synthesize many of the points made by the other presenters, emphasizing a general failure of libraries to articulate a clearly stated goal for campus outreach programs, and ways to help their individual subject liaisons achieve those goals. Some of the perceived weaknesses of these efforts are attributable to a lack of intentionality in hiring or reassigning staff who are well-suited to the tasks being assigned, but an even more fundamental problem is an almost total absence of a management structure to train, support, and evaluate the efforts of subject liaisons. Most notably, Mark cited an overall lack of urgency in changing or steering user behaviors on campus—urgency that is instilled in the commercial world by overall tracking of sales revenue and individual account manager motivation driven by commissions, bonuses, etc.

Mark closed the presentation by arguing that successful campus outreach programs should include the following factors: (1) clearly defined and measurable goals that are cast in terms of user needs and aspirations; (2) a set of strategies for altering user behavior in ways that support the defined goals; (3) a cadre of staff who can personally represent and reinforce the library's message to campus; (4) a management strategy and corresponding set of tools for monitoring and supporting the work of campus liaisons; and (5) an evaluative structure that recognizes and rewards success, on the one hand, and addresses failure on the other. At the end of the day, library outreach should be directed to encouraging the use of library resources—materials, services, and spaces. This means that nonusers need to be converted to users; occasional users need to be nudged to become more frequent users; and both nonusers and users alike need to be encouraged to act with immediacy to raise their level of engagement with the campus library.