I'll Be Back: Post-Purchase Activities and ROI

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Abstract

What kinds of services and support should be expected after the sale? Vendors are increasingly providing postsale services to their customers, typically in the form of account development. This panel discussion examined experiences that vendors, libraries, and consortia have had with one another, including which services have been beneficial, and explored future enhancements that will benefit libraries and users. The panelists provided specific examples of past collaborations, including customized trainings, usage analysis, and professional development events. Panelists discussed topics of interest to librarians and vendors with a focus on ways to get the best ROI out of library resources. Librarians and publishers on the panel highlighted the important role that each side has in improving ROI and marketing the resources to the library community.

Q: Michael, can you tell us a little about your role at the University of Central Florida and a few ways you recommend your staff interact with vendors?

Michael: I am Head of Acquisitions and Collection Development. I manage the Subject Librarian-Faculty Liaison collection development program and the library materials budget. I also work with library and publisher partners to leverage purchasing and share in collaborative ventures. I encourage my staff to build positive, mutually beneficial relationships with publishers and vendors. Our E-Resources Librarian and Acquisitions Librarian are both active in committee work and publisher relations. We feel there is mutual benefit to working closely with vendors.

Q: Tim, can you share with us a bit about your role as Founder/Chief Negotiator for the Carolina Consortium and how you facilitate communication with vendors among the members? What are the benefits of working within a group?

Tim: I coordinate 180 public and private libraries and community colleges in a buying club. We have a cost avoidance of $250 million a year. This is an informal, buyer's club group (rather than a more traditional consortium). Communications are not so easy. Negotiators do the work and then distribute the offers to members of the buying club.

As for advantages of working in a group, there are several. The entire group benefits from a collective wisdom. They share (stories of) benefits and problems with products, vendors, support, functions, pricing. Each library has its own expertise. We meet once a year. Some library experiences may not be valid. For example, someone may have had a bad experience with a particular sales rep, while others have had positive experiences with a different rep from the same company. The bad rep experience does not inform total company experience.

Q: Sarah, can you give us some insight into Account Development at Springer a few of the tools your team use in their work with libraries?

Sarah: My team, Account Development, helps customers achieve the best possible value or ROI from their purchases. We provide assistance with end-user marketing, including offering on-site presence for library or campus-wide promotions and events (such as library days, vendor exhibits).

We also provide regular usage and statistical analysis, for our own purposes and upon request. This helps us to keep track of customers and

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usage trends. A newish tool in our repertoire is a sophisticated web analytics program called WebTrekk. This helps to gauge end-user behavior .

Additionally, I offer implementation and discovery assistance to customers as needed.

Stephanie, you have worked in account development at both an STM publisher and a university press. How does account development differ between the two types of companies?

Q: Stephanie: It's the difference in working with larger vs smaller publishers. Access to resources is obviously a big difference. My role at Cambridge is hybrid, in that I have traditional sales responsibilities in addition to managing the account development program. However, having my fingers in lots of pies and wearing many different hats has its benefits. This provides more opportunities to meaningfully interact with different departments within the Press and communicate the needs of our library customers internally. Also, unlike an STM publisher, the diversity of content published by a university press can prove challenging. For example, how do you compare your STM content with the humanities content when it comes to expected usage?

Communication and Philosophies: Digging Deeper

Q: Tim and Michael, could you describe a few of your philosophies and techniques for interacting with publishers and vendors? What are some obstacles to communication you have experienced?

Michael: When working with publishers and vendors, my policy is "open door, open dialogue." This allows for collaboration and leverage of relationships. We appreciate the opportunity to assist with development and refinement of products and to act as beta sites. We often share experiences with other libraries through our involvement on library advisory boards and participation in various publisher and library forums. It is important to bring the wisdom of the various publisher representatives into the library environment. They visit with numerous libraries each year and are willing to share these ideas. They are a good resource.

Typically, subject librarians only get to see publisher representatives during on-campus events. More interaction is better, because it is possible to learn a lot from publisher representatives. We don't want publishers and vendors to fear contact with the library and rather we encourage collaboration including working together on presentations and articles.

Tim: Don't start off with antagonistic relationships from consortium to vendor. When more schools are involved, the price point is lower. Both sides are looking for positive outcomes. However, as a consortium you must be willing to walk away. No negotiation is legitimate without that willingness to walk away. Why talk to a rep who is unwilling to negotiate any concessions with me? When there is one deal for schools in more than one state, there can be problems. The more obstacles with permissions on the library purchaser side, the tougher it is to coordinate.

Q: Sarah and Stephanie, what are some of the ways you interact with the library community in a given year?

Sarah: Throughout the year, I visit customers to present usage and end-user behavior analyses. Conferences provide many opportunities for interactions—not only with scheduled meetings, but also via impromptu conversations at the booth and between sessions.

I also work with librarians to plan events of various types: training, end-user-focused, professional development, to name a few. For example, my colleague hosted a Big Marketing workshop where area librarians traded ideas and shared experiences in marketing their libraries. It was so highly rated, we repeated it at ALA Annual in Las Vegas.

Another way is reaching out through social media (see Springer's LibraryZone on Facebook), whether it's to share library news stories or for larger marketing campaigns like one we did for International Open Access Week.

Stephanie: We do less travel at Cambridge as a smaller publisher, but the methods are similar. I share usage analysis and tracking with clients and other sales staff at Cambridge. Additionally, we provide customers with promotional and instructional documentation for new purchases. And most recently, we undertook a benchmarking project to identify what "good" usage looks like at different levels of research intensity.

Audience Question: Sarah, how would you prove the ROI of the Account Development program to Springer if asked?

Sarah: To give a glimpse "behind the curtain" at Springer, we have a combination of monetary and customer engagement-related goals each year. We have reasons behind each bit of customer engagement. Feedback from librarians is a big part of our ROI. We are here to listen and bring your feedback to upper management. When Springer's reputation is enhanced after a successful event (whether it's a customer visit or larger event), that is also ROI.

Michael: Events involving faculty, staff, and other libraries are also ROI.

Audience Question (Charlie Remy, UTC): You mentioned that you do platform trainings. How would you respond to the comment Rick Anderson made that platforms should be intuitive, and that a platform which requires training is a bad platform?

Sarah: Our platform does not necessarily need training as such, but certain features and quirks that librarians need to know are important in the face of so many vendor platforms they deal with on a regular basis.

Michael: I see it not so much as staff training, but as a chance for all to see the product in the collective and give feedback to the vendor. Even with a very intuitive platform, it is beneficial to have someone point out the highlights.

Collaboration: Marketing and Usage

Q: All panelists, now that we have some background info, please tell the audience about a past example of collaborations. This can include onsite events or "behind the scenes" projects (such as statistical analysis).

Tim: For the first 10 years of the Carolina Consortium, each of our 170 libraries decided on their own whether or not to participate in each of the consortium deals. And that makes sense because no one knows a campus's information needs better than that campus's librarians. On the other hand, that meant each school was making decisions in a vacuum. We were losing collective benchmarking. I got in touch with our seven biggest publishers and asked them for usage and cost data, including cost per use for all schools and all deals. I made all the data available to schools in the consortium via a password-protected document on the website. Different schools can see how their cost per use compares to similar schools. It was easy to get the data from the publishers, and I'm glad they cooperated. This is an ongoing project, currently with five years of data. The data is assessed at three levels. I can compare which deals are best and worst for the consortium as a whole, which is great information for both the consortium and the publishers when it is time to renegotiate.

Within a given publisher deal, each library can see how much they are paying relative to other schools (both in total dollars and in cost per use). Each year I alert schools that have high cost per use. But I also emphasize that poor cost per use should not automatically trigger cancellation; there are many other factors to consider.

If a school is considering canceling a big deal, I can use their usage data to build a model that predicts what would happen to number of available titles, total usage, total cost, and cost per use, if they were to substitute direct subscriptions for the big deal.

But the schools in the Carolina Consortium don't use usage data to trigger automatic decisions. We use it more as a "warning flag" to alert us to gather more data, consider more factors, and look a little more closely at particular deals.

Stephanie: Cost per use is one measure—and certainly an important one—but not the only measure. I've done deeper usage analyses where I provide usage by subject. For instance—how does each subject perform compared to the number of titles in the collection? Which subjects are pulling their weight? Which are falling short? When we share this data with libraries, they can tell us if the results are surprising or expected. And looking at this helps us determine how we can best collaborate and which subject areas might need additional promotion or attention.

Michael: At the University of Central Florida, we had a University-wide event for Open Access Week with activities and speakers, including a publisher panel with representatives from Springer, Taylor & Francis, IEEE, and Gale. This was a great success and was only possible because of past, ongoing collaboration. If you keep a positive relationship with publishers and vendors it opens the door for these types of events that benefit faculty and librarians.

Sarah: This year, I held a professional development event at a large university where the goal was to facilitate communication between librarians, faculty, and publishers. When asked how the subject librarians collaborate with faculty at this school, the answer was "we don't hear from them unless they need something."

We held a mini-summit with publisher, faculty, author, and librarian speakers providing different viewpoints on a variety of topics in scholarly communication, such as Open Access and how faculty selects teaching resources.

Audience comment (Krystie Klahn, Columbia): At Columbia, sometimes students request publishing-related workshops (i.e., how to get published). Sometimes they are created by the library based on our ideas.

Audience comment (Richard Gedeye, Oxford): Graduate students in particular are seeking assistance on things like how to be an author and how to do peer review.

Q : Michael/Tim, how do your libraries communicate new purchases to end users?

Michael: We have a newsletter in the bathroom stalls about new purchases or enhancements to existing products. The library website with a push to our social media pages is also a way to communicate with end users. Our subject liaisons do a quarterly update and we send out weekly blurbs via the news blast from the Faculty Center for Teaching and Learning.

Tim: Make sure all your resources are very thoroughly covered by your discovery services. Advertising is less important than technical access and clear paths to the content needed at the time that it is needed. We use social media primarily to promote events at or by the library.

Q : Tim, how would you advise an institution in your consortium requesting marketing assistance?

I would point the librarians to vendors and publishers for assistance. We also have a white paper within the consortium on marketing ideas in the Carolinas.

Q: (Sarah & Stephanie), you have both mentioned usage as a priority in your Account Development teams. What metrics do you use to determine if usage is "good," and how would you work with an account whose usage stats are not where you want them to be?

Stephanie: We could spend all day trying to define "good" usage. Defining usage metrics is difficult, as usage is relative. We know that STM content is used very differently than HSS content, and different universities have unique programs with unique needs. Of course, peer-to-peer usage comparison and benchmarking can be helpful here. But ultimately the value of the content and how value is measured is the library's prerogative. Rather than making value judgments, it's our job as publishers to supply this data, do analysis, and show trends to relieve some of the burden on libraries who already do a lot of analysis on their end.

Sarah: (as was mentioned earlier), "Good" usage does not necessarily equal costs per use. At Springer, my team keeps data sheets where we look at cost per year and compare it against previous years. We want to see positive trends. We do look at cost per use, as we do not want it to be too high. Our journals package is a more consistent "big deal" package where we have clearer benchmarks for seeing positive trends. E-books are an ownership project. We examine usage four times per year, and look at things like date of purchase, allowing time for content to get added to the discovery layer.

The intervention process generally looks like this: we check to ensure access is up on the platform, then we look at the purchase timeline. Next, we perform a “discovery review” where we look at the library website. How easy is it to find Springer content? The last step is to contact the library and talk about the situation.

Stephanie: At Cambridge, we also have differences in usage between journals and books, but there is also the difference between science and humanities content to look at as well. We have to take inherent differences between subjects into account.

Audience comment (Richard Gedeye): Take into account the numbers of students and faculty in each department. Bigger and smaller departments should mean more and less usage. Some journals have less content than others. More articles per year should get more use. More users should yield more usage. Aggressiveness in some disciplines with research and assignment of more use of content.

Tim: Single most effective starting point in a conversation when demonstrating data is to sort by cost per use. The most expensive publisher in the Carolinas Consortium is three times more than the cheapest cost per use. Is the value of the most expensive content at least three times that of the least expensive? Alert schools of value based on cost per use.

Michael: Agree with other panelists. We want to focus on downloads, not sessions. Cost per use is important and the annual report has this data. We also look at environmental issues, such as changes in programs or changes in faculty acceptance of a product.

We pay attention to resources that are critical to certain areas even if the usage is low. It could be that the resource supports a unit that receives a large amounts of grants, or produces a lot of research with few faculty or students so usage is low. What is important is the final outcome of the usage, not necessarily the amount of usage. Put products in the context of curriculum mapping. Map your resources to our research activities. Make it easier for faculty. Faculty are so overwhelmed with teaching, so they need help with mapping of resources and assessment to bring in relevant content.

Looking Forward

Q: (Tim & Michael) In a perfect world, what sort of services would all vendors provide that is currently not offered?

Michael: Publishers need to be able to relate how effectively the library is using the publisher’s offerings. More collaboration with libraries in development of business models. There needs to be acceptable variations from all or none regarding big deals. If the offer is the big deal or nothing then the publisher may find that during difficult financial times that the decision will be to cancel the entire package. Sometimes we have to sign an unbelievable number of license agreements with the same publisher. There are far too many licenses per publisher. Having so many contracts to work through delays ordering and payment processes. I would like to see a limit on the need for license agreements for every product.

Q: Stephanie, what are some challenges you’ve faced in building a nascent account development program? What do you hope for your team to look like in 2015?

Stephanie: Luckily, building the account development team at Cambridge has provided more opportunities than challenges. As we grow, we seek more engagement from libraries. We’ll do more outreach going forward to learn how we can be more creative and what kinds of additional support libraries would like to see from us.

Q: Sarah, You have been with Springer for four years, and in the Account Development position for three. How has the position changed over the years, and what do you predict for the future?

Sarah: The position is always evolving to keep up with the changing library world. We look different now than before. In the past, the services we offered were more sparse and less developed, especially when it comes to end user marketing and communication. For the future, I predict we will continue to delve more into end user and author outreach and services.