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Abstract

The Purdue University Libraries library fee-based information service, the Technical Information Service (TIS) works with both international customers and international suppliers to meet its customers' needs for difficult and esoteric document requests. Successful completion of these orders requires the ability to verify fragmentary citations; ascertain documents' availability; obtain pricing information; calculate inclusive cost quotes; meet customers' deadlines; accept international payments; and ship across borders. While international orders make up a small percent of the total workload, these challenging and rewarding orders meet customers' needs and offer continuous improvement opportunities to the staff.

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Purdue University's Technical Information Service

In 1987, Purdue University established the Technical Information Service (TIS) with funding from an Indiana economic development grant. For the first 18 months, TIS offered research and document delivery services at no charge to Indiana business customers. For document delivery, staff filled only those requests available from the Purdue library holdings. Within a few months, it became evident that the grant funding was insufficient for covering all the costs needed to meet the increasing demand for services. In 1989, TIS made the transition to a cost-recovery fee-based information service.

With cost recovery came two major opportunities for increasing and expanding customer service and satisfaction. Staff were now able to accept orders from

clients anywhere in the world, and TIS also began placing special orders for documents unavailable in the local collection.

With these two opportunities came two inter-related document delivery challenges. First, international customers mainly request gray literature types of American documents (e.g., technical reports, unpublished conference papers, university reports) that are not only impossible for them to find in their own countries, but which also often prove difficult for TIS to verify and obtain. Second, North American customers frequently rely on TIS to find international documents that are impossible to find here, and which pose challenges to obtain from abroad. Over time, TIS staff developed procedures for successfully handling these two facets of international document delivery.

Document Verification

Whether TIS orders from a foreign supplier or an international client requests an American title from TIS, verifying an item's existence and availability is the first step. Sometimes bibliographic databases are helpful for verifying citations, but many of the items requested

are so specialized that they do not appear in any of the Dialog databases or in OCLC. Customers usually provide enough clues for staff to identify the issuing organization, however.

Verifying a title's existence may be very different from verifying its availability. Verifying availability usually means contacting trade associations, research organizations, university departments, publishers, or government agencies, either in the U.S. or abroad. The advent of the Internet has made this step much easier over the past few years; many of these types of organizations have websites with publications pages, or at least with contact information. Being able to find a foreign university's website, for example, and looking for its library (or bibliotek or bibliotheque) page, and then searching its catalog for a thesis or dissertation results in much faster verification than the former days- or weeks-long process of writing or faxing for information and waiting for a reply.

In the past, contacting international organizations was much more problematic. For example, several years ago in pre-Internet days, one of the authors called a library in Germany to ask for their fax number at a time when only the cleaning staff were on the premises. With the

language barrier insurmountable and time running short, TIS sent a letter to the organization via airmail asking for a cost quote by fax or email.

Turnaround Expectations

Most routine document orders can be filled very quickly on a rush basis within one country, or between two with a common border, even involving an outsourcing supplier and third party shipping. International document orders, however, are much less likely to turn around within hours or even within a few days. Issues such as document identification, cost quotes, pre-payment, and shipping may each take at least several days to resolve. Even next day international delivery, available at very steep costs, may translate as three-day delivery given time differences and a supplier's ability to pack an order quickly. TIS staff work with customers to establish reasonable expectations about possible turnaround times.

Cost Estimates and Firm Orders

In a cost-recovery operation, it is imperative to get a firm cost quote in advance that covers all of the

supplier's charges, and to calculate any other fees as well. These costs include some combination of the following:

- document cost
- citation verification costs
- handling fees
- shipping charges
- additional fees for expedited handling or delivery to TIS
- copyright fees
- shipping cost from TIS to customer
- bank fees for pre-payment checks in a foreign currency
- bank fees for converting a check in a foreign currency to local currency
- cost of faxes or phone calls

TIS almost always arranges delivery of items to its own office and then re-ships to the customer, even if two international deliveries and two shipping charges are then the result. Handling international requests is challenging enough without asking a Swedish trade

association to ship an industry economic forecast report to a Canadian company, for example. In addition, this practice preserves client confidentiality.

Finally, TIS adds an outsourced order fee plus delivery costs to arrive at a final cost for the client.

TIS then provides the customer with a written firm cost quote that covers all the expenses that will be incurred. The next question is whether the potential recipient will approve the total and place a firm order. Over time, TIS staff have developed a sense of average costs for supplying esoteric documents and can provide a customer with a rough estimate (usually as a range) in advance of beginning work on an order, taking into consideration the customer's timeframe. If the ballpark estimate is too high for the customer, then staff can save the time involved in verifying the title, finding a supplier, and calculating a firm order cost. Even so, a few items turn out to be unexpectedly expensive, or are unobtainable, or customers change their minds, so staff work on a small percentage of orders that are ultimately never filled.

Placing the Order

It is fiscally prudent to obtain pre-payment from new customers (international or not) before embarking on an expensive international document order. The almost universal use of credit cards has made this process much easier now than in previous decades when the time-consuming process of requesting or processing checks made out in foreign currencies was standard operating procedure. Obtaining and calculating firm pre-order prices is of course necessary for pre-payment.

After accepting the customer's written acceptance of the firm cost quote (and, in the case of a new customer, the pre-payment), TIS places the order. At this point the process is fairly straightforward since an initial contact with the supplier has already been made and the costs determined.

International Document Suppliers

Over time, TIS has established working relationships with document suppliers in several countries. For example, our document supplier in Canada is more familiar with obtaining obscure Canadian government publications,

technical reports, and other titles than TIS staff are. If a Canadian title is not readily available from standard sources, TIS staff will outsource the order to the Canadian supplier and rely on her expertise to track down and obtain the elusive document quickly and efficiently. The high cost of billing across frontiers can be reduced by establishing deposit accounts with frequently-used suppliers.

Suppliers in Europe, Asia, and Australia, fulfill the same function, with the added advantage of fewer hurdles in terms of time zones and, in the case of Europe, often of language and currency as well.

Filling Requests for International Customers

Some document requests from international clients can be filled from the Purdue University Libraries collection. Photocopies pose few problems, as they are handled like domestic orders, except with slightly higher delivery fees (faxing or courier shipping). TIS does not lend Purdue Libraries books to countries other than Canada. However, after checking the Copyright Clearance Center's website to ascertain that copyright payments can be made, staff routinely fax customers the books' tables of contents to

see if copies of a chapter or two will meet a customer's needs. If the book is still in print, TIS staff offer to purchase and ship a copy. In some instances, TIS has obtained written permission from a publisher to copy an out-of-print work in its entirety to fill an order.

International shipping fees often equal or exceed the cost of the material itself. TIS ships all overseas packages using carriers that trace the packages they ship and that confirm delivery dates. Several unfortunate experiences with the postal services in some other countries have convinced TIS staff that it is in the customers' best interests to use courier services like Federal Express, DHL, or United Parcel Service to ensure that material reaches its destination intact and in a timely manner.

Many international customers first find out about the Technical Information Service when requesting a Purdue publication from the library or from another campus department. These requests are forwarded to TIS for fulfillment. Staff treat these requests as marketing opportunities to demonstrate that TIS can not only fill this particular document need, but would also be a valuable partner in supplying other documents that might not be readily available in the requestors' home

countries. Successfully handling a single request has led to repeat business from customers in Canada, the United Kingdom, France, Turkey, Australia, Taiwan, Korea, the Ivory Coast, and many other countries.

Working with international customers has expanded the role of the Technical Information Service from serving North American customers to serving businesses around the world. Staff see the global marketplace very clearly when they order a document from the Netherlands and ship it to a customer in Australia. Although international requests make up a small percentage of the total workload, they prove both enjoyable and challenging to the staff, as well as fill customers' information needs for material they might not have been able to obtain otherwise. Staff continually learn about new techniques and resources when filling international orders, and apply these skills to improving overall service and fill rate.

APPENDIX I: REQUESTS RECEIVED

The appendix lists recent examples of the kinds of international document orders received by Purdue University's Technical Information Service and indicates the countries to which they were shipped.

1. Stanford University Working Paper / Tunisia
2. INSEAD Working Research Paper / Australia
3. US Department of Interior Report / United Kingdom
4. Purdue University Compressor Technology Conference paper / Spain
5. Purdue University Ph.D. dissertation / Hong Kong
6. Technische Universiteit Delft (The Netherlands) doctoral dissertation / Australia
7. Selected IEEE papers / Indonesia

8. Purdue University masters thesis / Brazil

9. University of Queensland (Australia) Ph.D. thesis /
Korea

10. Articles by a specific author in a 1908 British
publication / France

11. CIBER working paper / Switzerland

12. Harvard University Ph.D. dissertation / Australia