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Issues in Vendor-Library Relations

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Issues in Vendor-Library Relations

Negotiating Vendor Relations

Column Editors: **Judy Webster** (U. of Tennessee) <jdwebster@utk.edu> and
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by Judy Webster and Barry Fast

From Barry:

We ended our dialog in the June issue of *ATG* with the admission, from both of us, that negotiating is a learned skill, and one that is not taught (or if it is, not remembered) in either library school or business school. Our respective MBAs and MLSs never really prepared us for negotiating business relationships worth millions of dollars. When you really think about it, it's quite a responsibility. I'd like to see a **Charleston Conference** session on this, with a real expert who can teach us all some of the finer points of negotiating. Meanwhile, let's discuss some of the aspects of negotiating that we know and practice. We both agree that mutual respect and a clear definition of outcome are the two essential ingredients going into a negotiation. And we also know that mutual respect and a sense that both sides have achieved a satisfactory measure of their original goals are essential to a successful negotiation that is completed. Since we have to work together when it's over, we

want to make sure the process is free from acrimony or any sense of unfairness. We can't really balance the sides, because there are two different power bases. Your side is the buyer and has the power to determine from whom you will buy. And my side is the seller, holding something that has potential value to you. If that is not true, if you can't really make the buying decision, or my product or service is perceived to have little value, negotiations are a waste of time and effort. So at least one of the rules for a successful negotiation process should be that it is serious, that the buyer really can buy and that the seller's products or services are of genuine interest, carry real value for the buyer. If that's the case, there should be some sort of structure to the process. All the competing vendors and the serious buyer (sometimes several buyers) need to negotiate within a context of openness and an agreed upon process. As the potential buyer, how do you see yourself setting up the structure for a successful negotiation?

From Judy:

My preference is to follow the general outlines of a formal bid procedure in an informal way. The buyer (library represented by the acquisitions librarian) should draft a description of what is up for bid, e.g. approval plan, standing orders, periodical subscriptions, etc. including descriptors that define the scope of the product or service. Expected annual cost, the number of orders, subjects covered, and desired start time are important factors to

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Profiles Encouraged:

Anthony Ferguson

Born when and where: March 30, 1945, in Boise, Idaho.

Current residence: Haworth, N.J.

Education: BA from

Brigham Young University in 1969 in political science, Asian studies; an MA from the University of Washington in 1971 in political science; an MLS from the University of Washington in 1972.

Summary of job experience: Began as a social and Asian studies bibliographer in 1972 at BYU; moved into collection development in 1979; headed collection development at BYU, Texas A&M, and Columbia.

Family: Father of six with wife Cheryl.

Proudest Accomplishment: Chair the task force that revised the RLG Conspicuous collection depth codes for RLG/ARL/WLN.

Most Recent Goal: Complete digital information strategic plan and content for Columbia University.

First Job: Pizza cook.

Fondest Memory: 1964, awakening in Macau on a steamship at anchor in the harbor after taking an overnight steamship ride from Hong Kong. I had been locked in my stateroom overnight in case the Communists boarded the ship, and came out in the morning to see a procession of junks sail by.

Favorite Pastime: Collect books by and about foreigners in China.

Hobbies: Gardening, family history, church work.

Last Book Read: *Iron Horse: a Memoir of the Chinese Democracy Movement in the Tiananmen Massacre.*

Pet Peeve: Selfish people.

What would you like to be doing five years from now: Finishing a Ph.D. in higher education administration.

Had I but world enough and time: Teach library science in China.

Single most important piece of advice: Work harder than everyone else.

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include in the description. The second step involves deciding on the vendors to include in the bid invitation. In the informal process, the importance of being inclusive rather than exclusive cannot be overstated.

The formal purchasing bid process usually takes care of the problem by including additional vendors than those preferred by the library, but the informal one rests upon the acquisitions librarian's opinion and decision at this point. Omitting reputable qualified vendors for cause at the beginning of the process can make the entire process open to challenges by companies that have been excluded. I am not saying that every possible vendor has to be invited, but exclusions must be justifiable. One option for winnowing the number of possible bidders is to draft a brief questionnaire asking for responses to criteria that will determine who is invited to make a presentation or who will be on the final list of vendors to be evaluated. Before I add additional steps in my "ideal informal bid" do you have any comments about the ones I've mentioned so far?

From Barry:

I like the pre-RFP questionnaire idea for several reasons. It provides some guidance for you on how to structure the informal RFP, based on answers to the questions. Some vendors may raise issues that you've not thought of, or some may have such lackluster responses that you want to eliminate them at this early stage, simplifying the later decision-making process. It helps the vendor too, because it enables us to get some sense of your needs and your thinking, before we enter the into the informal RFP process. The goal at this stage should be to get everyone on board, and by involving your team in the questionnaire design you can establish an environment that should work well when the RFP is designed and then evaluated. The same thing should happen on the vendor's side. By forming our response team to your questionnaire, we'll be more effective later when we respond to the RFP. How do you feel about vendor presentations as part of this whole RFP process? Should the library make decisions without having a series of presentations? These take a lot of time for your group, and they cost vendors a significant amount of money. My personal preference is to meet with the decision-making committee, but I can also see a preference to dispense with that part of this process. What do you think?

From Judy:

I agree that presentations are very expensive, for libraries in terms of the time involved and especially for vendors who must pay travel expenses. Smaller projects can be bid without vendor presentations but larger ones, in the

hundreds of thousand dollar range do benefit from on site meetings. There are a few things that an acquisitions librarian can keep in mind when planning an informal bid process which can assist vendors in keeping the travel costs low. The first one is to allow for plenty of time in the process so that all of the invited vendors can make their travel arrangements in advance. This gives the vendor representatives time to plan an extended trip to see other libraries in the area or to work in the presentation as a leg of a much longer trip. Another is to invite only the serious contenders for a visit. The questionnaire assists the librarian in making that determination. Once two or three vendors have been selected, it is important to plan each visit so that the vendor representatives see the same groups or individuals. In libraries, that task is getting to be almost impossible given our hectic schedules these days, but it is still an important goal.

The criteria that will be used for evaluation of the proposals should be determined in advance. The acquisitions librarian should be able to communicate the most important criteria when the vendors ask, and in my experience, most of them do. Vendors should also be aware that big decisions are rarely made by a single individual in academic libraries these days. Our organizations have been flattened, stretched, and re-engineered to the point that decision-making has become consensus-driven among players that are new to the game. The national visibility and reputation of the companies making presentations are critical. This may not be fair, but it is a fact. A company that is not already well-known has almost no chance to succeed in this environment. Have I gone too far? What's your perception?

From Barry:

I think you are being very fair to vendors, and we have to be fair to librarians. That means that we keep our presentations to the time-frame allowed, that we make sure in advance that we let you know what equipment we need for our presentation, and that we address the issues with facts. Selling vaporware is very unfair. If something is in development, we should state that, and give a realistic date for release. Reputation is everything in the relationship between vendors and librarians. It's realistic to expect a vendor to have some sort of track record, if only by reputation, to help librarians make judgments about them. Advertising can be informative, and it can create an image. But the reality rests with people who have used a vendor's services, or trust the judgment of others who have. That determines reputation. 🍀

For Readers Only — September, 1996, page 73— The Answers

1g, 2n, 3k, 4j, 5i, 6m, 7s, 8l, 9h, 10e, 11a, 12r, 13p, 14o, 15c, 16d, 17u, 18t, 19f, 20q, 21b