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Biz of Acq: How to Make Your book Vendor Love You

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Column Editor's Note: *Maintaining positive working relationships with vendors remains a vital aspect — and often a genuine challenge — of library acquisitions work. In an environment of budgetary stringency and evolving services that make outsourcing of certain acquisitions operations a sensible choice, booksellers and other vendors can act as integral partners with librarians in the acquisitions process. How can we foster and improve our relations with vendors?* **Rick Anderson**, Head Acquisitions Librarian at Jackson Library, University of North Carolina at Greensboro, and formerly Customer Service Bibliographer with **Yankee Book Peddler**, draws on his experience with a major vendor to provide us with valuable answers. — RR

How to Make Your Book Vendor Love You

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You'll never get them to admit it, but you're on either a Good List or a Bad List with your book vendors. You might be surprised to learn, however, that the Good List is not made up of librarians who are pushovers or just plain big spenders. You can be a tough negotiator from a tiny library with a small budget and still be the apple of your bookseller's eye. You can also represent a huge library with a monster budget, all of which you've committed to a single bookseller, and still be the bane of that vendor's existence. It's not that they don't care about money; it's just that they want more than your business. They also want you to be efficient, realistic, and pleasant.

But so what if you aren't? Maybe you think it doesn't matter if your vendor hates you. After all, you're the customer, right? Not exactly. In a very real way, you're both customers. The wholesaler wants something that you have (namely, your budget money). You, on the other hand, want something the wholesaler has (efficient access to books at a discount), and you're selling access to your budget just as surely as the vendor is selling labor efficien-

cies and discount. You may respond cynically when you hear talk about "partnership" between vendors and libraries, but the relationship really is symbiotic. And just as a smart librarian takes more than discount into consideration when choosing a vendor, booksellers think about more than raw budget figures when deciding whom to pursue — vendors will bow out of contention when they deem the potential business not to be worth the trouble. If you issue an RFP and the vendor who declines is the one that would have best helped you stretch your budget and ease the pressure on your staff, then your library — not the vendor — is the loser. And the principle of selling yourself as a customer remains important after a relationship is already established; the more attractive you make your library, the more leverage you'll have when it comes time to negotiate discount or request the implementation of new services. Offering a bigger slice of the budget pie is certainly one good way of making yourself more valued as a customer, but it's also the most expensive one.

In thinking about some cheaper ways that a library could enhance its status as a customer, I drew on my experiences working in customer service for a book vendor, during which I worked with many staffers and librarians on a daily basis and also occasionally accompanied the sales staff on library visits. But most importantly, I asked sales reps for several major vendors what they wished librarians would do differently, or what some of their customers do especially well. I promised not to name names or quote anyone directly so that all could contribute without inhibition, so I want to make it clear at the outset that many of the ideas presented in this article came from others. Special thanks is due to them.

When Issuing an RFP

Make sure that your list of requirements is realistic. By all means, solicit the input of all library staff. But once a wish list is compiled, examine it with a judicious eye. Is the library actually ready (or will it soon be ready) to implement all of the services you've listed as "required"? Can they be ranked in importance? Remember: you don't want to scare off the right vendor by asking for more than anyone can reasonably provide. You may find that those very vendors who say they can give you the world turn out to be the least reliable in the long run.

Make sure you give enough lead time. If you want good, careful responses to your RFP, allow at least a month between the time it's issued and the due date.

Allow for negotiation of key points, especially discount. Recognize that a vendor will

cite a discount in its response if required, but that face-to-face negotiations can sometimes result in adjustments. Don't ever reject a proposal because of one point — if you're sticking on one issue, make a phone call and see if it's negotiable.

When Hosting Vendor Presentations

After the proposals have been analyzed, you'll select several vendors to come and give presentations in person. When you invite vendors to come to your library and sell their services, you're embarking on what amounts to a fairly elaborate mating ritual. The vendors come to present themselves, but also to get a sense of who you are and how your library works. It's true that you have an advantage; if the vendor agrees to present, you can assume that you're already considered a desirable customer. But that doesn't mean you can't blow it by being unprofessional. Here are a few tips: Only invite serious candidates. Don't invite a vendor out of politeness. It does the vendor no good to go to the significant expense of a library presentation if there's no real chance of winning the business. You might be required to invite a certain number of vendors, meaning that you have to bring in some who are less interesting, but insofar as it's possible, limit your presentations to those being considered seriously.

Make sure that all of the library's decision-makers are present. This is obvious. You can't compare the candidates if you don't attend all the presentations.

Allow some flexibility in presentation format and time allotted. You'll need to impose some limits, of course, but make sure they're reasonable and be willing to work with the people presenting. If they have special equipment needs they should let you know ahead of time; likewise if they want to take more time than you've indicated. But it wouldn't hurt for you to call beforehand and make sure everyone's expectations are still in sync, either.

Make sure there is adequate technical support on hand. Establish the presenters' technical needs ahead of time. If you can't meet those needs, make sure they know in advance so that they can make other arrangements. Once the technical parameters of the presentation have been established, make sure someone will be available to take care of the inevitable problems. No one — not you, not the vendor — wants to sit around in a conference room for half an hour while someone goes looking for help with the overhead projector.

After the Presentation

Once your decision is made, report it promptly to all contending vendors. This is a

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simple courtesy. Unless you have specific reasons for delaying the announcement, let everyone know the decision as soon as it's settled.

Provide feedback to all participants. Point out weak and strong points in their presentations. Be specific about why you did or didn't go with each one. Vendors don't want their feelings protected; they want to improve their services and presentations.

Once you've chosen a vendor, you'll usually have another visit from your sales rep and, in some cases, a member of the vendor's customer service staff. During this visit you may, depending on the service to be provided, write an approval plan profile and publisher list, establish a list of continuations, or discuss electronic ordering, order confirmation, and invoicing. You will certainly establish expectations for shipment schedules, general order formats, returns arrangements, and so on.

When Setting Up Services

Someone from the library must be in charge. The sales rep cannot act as "bad cop" when a faculty member gets long-winded or when a couple of selectors start a miniature turf war in the conference room. Make sure that someone (usually the head of acquisitions or collection development) is there to guide the process.

Be prepared. Know what's going to be discussed, have some idea of what services the vendor has to offer and how its systems work, and define ahead of time any specific problems you wish addressed. Only you know what your needs are — don't waste the time you have with your rep by waiting to define them until he or she arrives.

Plan the agenda carefully. Try to ensure that there's enough time for everything that needs to be done. Plan for short breaks, but don't let them turn into inordinately long ones. Help participants follow the schedule so that everyone's needs get addressed.

Make sure that people involved in the setup process are intimately familiar with the library's systems and day-to-day procedures. This sounds obvious, but too often time is wasted while an administrator or department head goes looking for technical help. If you don't know exactly how records are overlaid, invoices processed, records imported, or FTP files downloaded, then make sure you have a technician on hand while you set up the nuts and bolts of your new service.

Give the sales rep an opportunity to meet those staff members with whom he or she will be working in the future. The day-to-day business you conduct with your vendor will take place almost completely on the phone or through email. One face-to-face meeting between your front-line personnel and the vendor's can make a surprisingly great difference to the quality of those future communications.

Insofar as it's possible, settle internal arguments before the sales rep arrives. It's not that the rep isn't willing to help discuss relevant issues, but you don't want to waste the brief time you have with him or her there. Your rule of thumb should be: while the rep is in your library, spend as much time as possible doing what can only be done with the rep present.

After your sales rep leaves and the vendor's services have been defined and an implementation schedule put in place, the real work begins. If you have an approval plan, a large continuations list, or have committed a significant amount of your firm order budget to a single vendor, you may be in touch on an almost daily basis. Here are some ways to make those contacts as pleasant and effective as possible.

Day-to-Day Operations

Make sure that your best people act as the interface with your vendors. That's what the vendors try to do, and it's an approach that will benefit you in two ways, one obvious and one subtle. First: it simply helps to ensure that things run smoothly. Second: if your front-line staff is competent, efficient, and pleasant, your library will cultivate the vendor's respect. Don't make the mistake of thinking that's not important. You will get better service from vendors whose experience with you leads them to believe that yours is a smart, well-organized, and efficient organization.

When ordering, present the order information in as uniform a way as possible. The more you vary the presentation of order data, the more mistakes your vendor will make. Remember that you are one of many customers. A good vendor will do all it can to learn your idiosyncrasies, but you'll help yourself by making that learning process as easy as possible.

Set and publicly declare firm internal guidelines for the submission of orders. If a faculty member makes an end run around your

acquisitions department and calls the vendor himself to order a book, a smart customer service rep will check with your acquisitions staff before proceeding. But don't assume that that will always happen. Tell your vendor who can and can't initiate orders, and educate your own staff and faculty about correct procedures.

When ordering a book, provide full title and ISBN. If either of those is impossible, then provide as many as possible of the following: All the title information you can possibly dig up; Full author name; Publisher; Publication date; Edition number (if applicable). Remember that for vendors, the ISBN is usually the single most important piece of data — it's as close as you can generally come to a unique identifier for a specific edition and binding of a particular title. Making an effort to provide full information with your orders is a very wise investment of time and energy. Remember: it's always cheaper and easier to order a book correctly the first time than to do it twice.

Develop a common language. To the extent that you can learn your vendor's lingo, do so. But you have multiple vendors just as your vendor has multiple customers, so your vendor needs to learn yours as well. (Your vendor probably ought to provide a glossary of terms. If not, ask for one to be created.) Here are some terms that vary in meaning from vendor to vendor and from library to library. Some of them may surprise you: Account; Claim; Status; Management Report; Firm Order; Profile; Series/Serial/Continuation; Subscription.

Remember that sales and customer service are different spheres within all but the smallest companies. Communication between the two will rarely be instantaneous and is not always perfect, so don't assume that everything you've told your sales rep has immediately and accurately been communicated to your customer service rep or vice versa. If you explain a nuts-and-bolts operational problem to your

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sales rep during a visit, he or she will probably be able to prepare the ground for its solution back at headquarters. However, you may need to go over it again with the customer service people. Be prepared for that possibility.

Identify yourself clearly by name and institution when you call. Don't make your customer service or sales rep ask your last name; it will be embarrassing for both of you. Similarly, don't expect that your rep can remember the person after whom your library is named. In other words, if you call and say, "This is Rick from the Jackson Library," you may well hear a cheerful but noncommittal greeting accompanied by the faint sound of pages flipping or keys tapping while the rep tries desperately to figure out exactly which Rick you are and which town or college has a Jackson Library. Instead, say, "This is Rick Anderson from UNC Greensboro." Then your rep can say, "Of course, Rick, I'd know your voice anywhere. How are you?"

Be assertive. Don't be apologetic about expecting excellent service. You should expect responses to your calls and email within 24 hours. If you request a service and the vendor cannot provide it, you should get a clear response and an explanation that makes sense. If the vendor makes a mistake, there should be an apology and the problem should be fixed quickly. These are fundamentals of customer service — if your vendor is not meeting any one of them, say so. If your vendor consistently fails to meet basic standards of service, consider taking your business elsewhere — even if it means giving up a discount point. In the long run, lousy service will probably cost you more.

Be reasonable. You and your vendor are equals in a business relationship. If you expect your vendor to move heaven and earth to

satisfy your every whim, you'll probably be disappointed. But you should expect efficiency, courtesy, and effectiveness, and be willing to provide the same yourself.

Once you've established a service, you should expect a regular (usually annual) maintenance visit from your sales rep. This visit will give you the opportunity to find out what new services are being developed, to address service problems, and to renegotiate terms. The worst thing you can do during these visits — both to yourself and in the eyes of the vendor — is to squander the time you have with your sales rep by being unprepared or unorganized.

When the Rep Makes Maintenance Calls

Keep your appointments. If you have to miss an appointment, warn the rep as far ahead of time as possible and/or make alternate arrangements. Again, this is basic courtesy. If you wake up sick, send email or leave a voice message as soon as you can drag yourself to the computer or phone. If a last-minute conflict comes up, try to have someone else sit in for you with the vendor. At the very least, make sure that someone is available to explain the situation. Bear in mind that your rep has probably traveled a good distance and is trying to get as much done in as short a time as possible — if your meeting falls through, he or she can probably make good use of the time if given sufficient warning.

If there are problems to address, be prepared with specific information and, preferably, examples. When your sales rep returns to headquarters with your complaints or problems, the in-house staff is going to ask for as much specific information as possible. The more you provide, the more quickly you'll see results.

Understand that the sales rep's job is to sell. Don't be offended when the rep tries to sell a new service or asks about budgets or your satisfaction with competing vendors. If you can't or

would prefer not to answer such questions, just say so clearly and politely. If your rep is pushy, takes it personally, or otherwise doesn't respond well to that approach, complain to the company.

Let your "no" be "no." If your answer to a sales pitch is "no," just say so clearly and politely without trying to dodge the question or spare the rep's feelings. Again, you should expect your rep to take a "no" gracefully.

Be realistic in what you ask for. In the immortal words of Steven Wright, "You can't have everything; where would you put it?" At the same time, don't be afraid to ask for things that the rep hasn't yet offered — vendors are constantly trying to see the future, so they want to know what you need, even if they can't provide it yet.

In Conclusion

The bottom line is boringly simple. It's the golden rule: think of your vendor as a partner in a professional venture, and do unto your vendor as you'd have your vendor do unto you. It's a given that each of you is going to try to gain as much as possible from the other — you'll be trying to increase your discount and get more services (preferably at no additional charge), and the vendor will be trying to increase its share of your budget. But that doesn't make you enemies, nor does it even preclude a happy, warm, and mutually beneficial relationship. 🐾

Further Reading

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to prepare our worst case scenarios but to be truly profitable, they should focus on preparing responses. What about unexpected results or consequences of the change? Libraries should anticipate problems and crises and have planned responses for those things that are known risks. By preparing for problems in general, unforeseen problems will be easier to deal with.

Build a cushion into your budget, not just for cost overruns but for unforeseen or even anticipated contingencies — your disaster list, for example. But don't base your cushion on FEMA money. Management disaster areas don't qualify for any kind of bailout. Have a written contract that you (and your legal office) and your vendor develop together, agree to, and sign. This agreement is needed by both sides. The contract should clearly delineate how the service or product is to be evaluated in no uncertain terms. Penalties for non-compliance ought to

be clear, reasonable, and measurable in ways that both parties can understand.

Payoffs

If you plan well, work hard, adjust to circumstances, solve your problems, and eat all of your vegetables, you are bound to have some successes, but don't assume they will introduce themselves. Look for them, identify them, understand them, build on them, and ABOVE ALL, PUBLICIZE THEM. Knowing or learning how to measure success is essential when evaluating a project. Such analysis is necessary for making those adjustments that solidify success and that bring about other beneficial changes. As planning, implementation, and failures are shared, so too should successes be shared. Don't assume that everyone sees the same thing and that everyone will agree that satisfactory results were achieved. Publicize the successes and explain in as much detail as possible what the payoffs are.

Mention your successes in meetings, hallways, newsletters, press releases. This recognition assures participants that it was worth the

pain. Recognizing success does not deny problems but when they are solved, you have more successes to publicize and build on.

Afterword

Contracting for services is really all about change. How can we do things better is a question that librarians ought to be asking themselves as part of their daily routines. That is really what defines critical thinking: why, what, how, when. Even if no changes are made, we should learn from the questioning and answering. We should know why we do things for that is a reflection of our philosophy of librarianship. We should know what we do (our policies and practices) so that we can see if they fit our philosophy. We should know how we do things to see if they fit our philosophy and if we can improve on them. We should know when we do things for the exceptions to the rules really define who we are and should stem from a philosophy that is positive and vital and that thrives on change as a constant in life and promotes a constancy in change that is essential to good library service. 🐾