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Issues in Vendor/Library Relations — You Are Invited

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A few years ago I helped with a sales presentation at the **Universidad Nacional Autónoma de México**, or **UNAM** as this place is always called. Built on a lava bed strewn with volcanic rock, laced with gardens, the main campus in Mexico City is the centerpiece of an institution of some 270,000 students. **UNAM's** central library is the canvas for what's likely the world's largest mural, an iconic Aztec-themed mosaic covering all four sides of a high building that presides over **UNAM** like a deity. Our van driver that day, though, took us to another of the more than 90 **UNAM** libraries, at the **Instituto de Investigaciones Sociales**, where under a veranda off a central courtyard our hosts had laid out a breakfast of sliced fruit, pastries, juice, and coffee, which we enjoyed in the morning air as librarians from around the vast campus began to arrive and fill their own plates, to make small talk with one another, and to graciously take part in our efforts to make small talk with them in our best fractured Spanish.

After awhile we moved inside, to the presentation room, to set up. This is always an awkward patch of time as we vendors attempt more small talk while fiddling with computers and projectors, thinking through the presentation, feeling out the room, deciding where to sit, finding a discreet but reachable place to put away briefcases, asking for a bathroom, getting coffee or a water, finally sitting down.

Maybe it wouldn't work somewhere else, but in Mexico City all these multi-tasking preliminaries were easier than the norm — considerably so — thanks to **Muzak**. Not before or since have I experienced it, but I can say from that **UNAM** morning that **Muzak** piped into a room before a sales presentation can have a soothing, settling effect, an effect you notice and a moment you remember, one unlike the normal non-experience of **Muzak**, and also unlike the normal pre-presentation experience we have north of the border, without a soundtrack.

Thinking of that day always reminds me that like everything else, business is a culture-bound activity. For us, being businesslike is a big part of how business works, and in the particular business of library vending, the presentation experience normally begins weeks or more beforehand when an email arrives to say, "You are invited to present...." It's one of those phrases that binds us together, libraries and vendors, in a ritual that's been as central to our own business culture as anything you'd hear about in an anthropology class. Whenever invitations go out to put on a sales presentation, all of us have our tribal roles learned long ago, to help us combine courtship and conflict in recognizable, acceptable ways.

Although that's a little tongue-in-cheek, there is a timelessness to sales presentations. In some ways the most recent ones in which

I've taken part are hard to tell in memory from the very first ones I helped with in the 1980s, not to mention all of them since. I'll bet some veteran librarians might say about the same thing, recalling the arrival, the greetings, the room, the chairs, the agenda, the screen, the slides, the break, the questions, the answers, the end, the thanks, the goodbyes.

Not such a long time ago it took libraries some real work, some real thought, to make up its list of companies to invite for presentations. When it came to periodical vendors, book vendors, ILS vendors, once there was a stable to choose from. There might be four, five, six companies who could be asked to come in and make their case, because there were that many who could plausibly do the work.

Four, five, six sales presentations lined up over a week or two? That was too much to ask of any serial audience, so effort went into paring down the four, five, six to a group more like three, or four at the outside. If you were one of the vendors invited, you were pleased. If you weren't invited you weren't pleased, but you weren't necessarily surprised, not at least if you were one of the smaller vendors.

It's a different story now. The smaller companies are nearly gone, and the larger companies able to fully service large libraries. Well, let's just say that if for some reason you felt like doing it, you would need the fingers on just one hand to count the remaining firms and, with the digits you didn't need, could make several of the better known hand gestures, like **Winston Churchill** showing the V for Victory, a catcher calling for a curveball, or **Michael Jordan** celebrating a three-peat.

Today for a library the work and effort in sending out presentation invitations is to make it seem as if it really did take some work and effort to select the companies invited. The "You are invited" message always makes reference to some measure of prior selection process, implying that you might not have been, and so ritual does its work. That's the businesslike way of doing it.

Of course it's closer to the truth today that a library has little choice when it comes to picking the companies being reviewed for one of these traditional vendor roles. And equally true that we're all basically reinventing those roles as fast as we can. After all, how concretely can a library be in saying just what it is you'll be wanting from your [fill in the blank — book vendor, periodical vendor, systems vendor] a few years out from now?

A difficult question, and really, a question that needs to be asked. What your vendor does today, who knows? — you might not have the same need for, next time it's time to give your vendors a look. Will your vendor be able to deliver what you will need then? And how to find that out? It's enough work to find out whether a vendor can deliver what you do need today.

Today a first step is nearly always a written vendor response to a set of library questions, another formal exercise heavily clothed in ritual, with both library and vendor to one degree or another playing their roles.

This isn't a bad thing. Business requires a certain amount of ritual so that we can talk to one another at all. But ritual can go stale. Do librarians complain because the vendors mostly sound alike, say the same things, say what anyone would expect them to say? Once a librarian asked me if I could send him an example of a Request for Proposal that some other library had sent our company. The RFP, of course, is one of the ways libraries elicit those written vendor responses to questions. He favored opening a vendor review at his own library and told me he'd tell his colleagues he'd had the RFP form in his desk drawer. (This was prior to the online age.) It would be easier for him not to have to write the questions.

All library vendors have staff whose job is to draft responses to RFPs. They don't write from scratch. Instead, since the questions from libraries are usually similar, they start with boilerplate text, and edit to suit circumstance. If my librarian above would have taken the time to write his own questions, in the end those questions probably wouldn't have differed very much from the ones I sent him. Another time I remember two libraries, geographic neighbors who went through a vendor review process one on the heels of the other. The person who drafted our company's responses told me she'd need a little help with one or two questions from the second library. "But I'm OK with most of the questions," she said, because that library had copied most of their neighbor's RFP form.

Libraries need to demonstrate due diligence — we know that, of course — but boilerplate answers to boilerplate questions, how numbing is that?

Then there are those presentations, another due-diligence task. I have never sat on the library side of the room for a sales presentation, and so can only imagine how, in our worst moments — not that we don't

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have our good moments too — we vendors must sometimes sound.

If we sound rushed, that may be because there is only a short time to say all we have to say. If we sound like animated boilerplate, that may be for the same reason, since you need to say certain things, and there are only so many ways to say them. If we sound off-track, that may be because the room is full of staff who don't have a lot of interest in hearing about things that don't directly bear on their own work. If we sound off-balance, that may be because anyone in the room can at any time ask a question about anything at all. And if the vendors sound the same, that could be because, with so few left standing, in certain baseline ways they are the same. Otherwise, they wouldn't be around.

When there was a string of vendors to choose from, libraries couldn't spend a lot of time vetting each one of them. Long written responses to lists of questions and short, staged public presentations became standardized steps, first one, then the other. That saved time and in the end there was some information, at least, for a vendor selection committee to go on. If sometimes it all seemed like a combination of Greek rush week, a beauty pageant, and the SAT exam, at least everyone knew the rules.

Should things be done differently? If what a library will need to do in the years ahead is mainly to keep on with what it's been doing, maybe there's no need to change a thing. The vendors all know how to show-and-tell on how they can assist. Or if what you'll want from your chosen vendor is regular live shows with a written report, then our current practice is perfect.

But for any library who thinks there's real change in store, there might not be any boilerplate text or any PowerPoint slides that will help too much. Maybe it would be better to figure out a way to get to know a company's organization a bit and then really engage the vendor's smartest people with your own smartest in a little thinking about some fundamental questions. What kind of problems does the library face today? What kind of change is clearly ahead? Do they seem to be listening and understanding? How close are the vendor's ideas to yours? What have they done about them so far? What problems does the vendor face? How willing is the company to invest in ideas at all, if at the moment there's no certain payoff?

What's the best forum for that? For one thing, a vendor should be able to say things you can't say in the front of a presentation room and can't write in the boilerplate sent in under the purchasing office's deadline. It would be no beauty pageant, not all sunny smiles. No one would have every answer, but even that's worth hearing. Have a real discussion. Maybe your staff should have a

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real chance to engage with the vendor too, in a setting other than the Q&A minutes of a presentation. Ask for access to their systems. Ask for some training. Set up a trial. Ask to talk to the vendor staff they'd be talking to. Visit the company if you can. It might take more time, but there are fewer vendors to spend time with now, so why not?

Written questions could follow, based on all this. They might be better ones. They might be questions nobody has in their

drawer. And, written vendor answers, ones that might not start out as boilerplate. You could hold presentations too, and you'd probably get better ones there also, with vendors knowing more about your local situation, since by then they'd actually have talked to you. No need to ignore due diligence, to scrap the entire ritual.

But about those invitations...maybe you could please just give us a call? 🍄