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Lessons Learned

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as an academic. Since joining **Springshare**, I've attended two large conferences — **ACRL** and **ALA Annual**. When attending these conferences as an academic, my focus tended to be on attending (and sometimes giving) presentations. As a vendor, the majority of my time was spent in the exhibit halls. I find this experience to be invigorating, if a bit hard on the feet. It was incredibly satisfying to speak to so many people! In my opinion, networking with colleagues is one of the primary reasons for attending a conference — and I feel I succeed at this goal much better as a vendor than I could as an academic librarian.

What I Miss About Academia

Although I've discovered and embraced the many advantages to being a vendor, I must admit that I sometimes miss academia. Specifically, I miss interacting with students and faculty. I am perpetually curious about students, their information needs, how they go about fulfilling those needs, and how their information-seeking strategies differ from my own. I loved working with faculty, especially learning how they use technology to enhance their teaching and how library resources can contribute to their work. Thankfully, working for a vendor has not prevented me from learning about students' information needs and faculty's use of educational technology — but it has, by necessity, put me slightly farther away from the conversation.

Conclusion & Reflections

In the introduction to this piece, I stated that I had never imagined working for a vendor. I think this is not an unusual mindset; many librarians deviate from and often outright shun this career path. I'd like to encourage people to reconsider this attitude. I think all vendors that serve libraries need to hear the voices of librarians — and sometimes, we have greater voice and power from working within.

Don't mistake me, though — vendors are not the only ones who can benefit from partnering with librarians. This position has been invaluable in helping me hone and expand upon my technical skills. Working for a vendor may be an excellent way for you to advance your own professional goals.

I've appreciated the opportunity to share my experience with you; I hope you will feel free to contact me with any questions you might have about working for a vendor. 🌱

also promised to run a **Provost's Panel**. We also have **Anurag Acharya**, Founder and lead engineer of **Google Scholar**, **Peter Brantley**, Director, **Bookserver Project**, **The Internet Archive**, **Kirsten Eschenfelder**, Professor,

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Lessons Learned

by **Amira Aaron** (Associate Dean, Scholarly Resources, Northeastern University Libraries)

As a “seasoned” librarian who has transitioned more than once between the academic library and vendor world, I have been thinking lately about several themes which unite all of my work experiences to date. In the past, we've often concentrated on the differences, but I think now that the similarities are really more important.

First, just a little about my background. I've had the good fortune of being on the staff of several excellent academic libraries, including **UCLA**, **MIT**, **Harvard**, **Brandeis**, and, currently, **Northeastern University**. But my career was also greatly enriched by the opportunity to work for serial vendors including **Faxon** (twice), **Readmore** and **Blackwell**, and to consult for some others.

So here are the major themes I'd like to discuss in this context:

1. Leadership
2. Innovation and Entrepreneurship
3. Customer Service
4. Collaboration
5. The Bottom Line
6. Trust, Transparency, and Respect
7. Need for Market Research and Prioritization
8. Technology
9. Organizational Culture and Staffing

Leadership

I am fortunate to have worked with a few incredible leaders in the industry — both at vendors and libraries. These leaders had clear vision and were willing to take serious risks. I think about **Dan Tonkery** and **Russell Shank** at **UCLA** who foresaw the potential early on of automating the library and made it happen. **Dan** then went on to expand his vision and leadership at more than one serials vendor. I can also point to **Will Wakeling** at **Northeastern**, who has a vision of transforming the library's value proposition on-campus and is guiding us carefully through that transformation. I never had the opportunity to work for **Ex Libris**, but have observed the vision of staff such as **Oren Beit-Arie**, bringing to the industry developments such as **SFX** (openURL linking), integrated search, recommender systems, and now a cutting-edge ILS in the cloud. These leaders are not content to accept the status quo and are always working towards an improved future and better service for their clients.

But one caveat here. It's not enough to be visionary. Leaders need also to know their market, know how to effectively undertake successful projects, and know how to hire and motivate staff who will make it all work. Unfortunately, many of us have seen

and lived through examples of vision (think **Faxon**) which was not based on reality and destroyed entire enterprises, both companies and libraries.

Innovation and Entrepreneurship

Coupled with the clear vision of a successful leader, I have found that the most exciting and successful organizations are those which foster a level of innovation and entrepreneurship among the staff. I was so fortunate to participate in the in-house development of one of the first integrated library systems, **Orion**, at **UCLA**, and the formation of the innovative back issue services, **Backserv** and **Backmed**, at **Readmore** (still ongoing at **Swets**). With the help of my colleague, **Marilyn Geller**, we also mounted the first vendor catalog on the Web, **ReadiCat**.

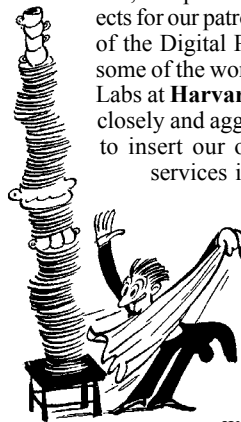
Another driver for innovation is that of competition. I remember that **Marilyn** and I had great fun and a good deal of motivation going head-to-head with **Fritz Schwartz**, then at our competitor, **Faxon**. Our library clients were the beneficiaries of our hard work, entrepreneurial thinking, and efforts to best each other. Similarly, at **UCLA**, **Dan Tonkery** and **Russell Shank** were driven partly in competition with other campuses and especially the statewide Division of Library Automation. Unfortunately, efforts to commercialize **Orion** were not approved by the campus administration. Today, libraries face steep competition with **Google**, **Amazon**, and other information services. We need to step up to the challenge and, as a profession, work on innovative projects for our patrons — witness the development of the Digital Public Library of America and some of the work being done at the Innovation Labs at **Harvard**. We also need to work more closely and aggressively with our competitors to insert our own expertise and innovative services into our users' preferred information environment.

Customer Service

The ethic and practice of excellent public service must permeate the culture of all types of organizations. At **Faxon** the customer service account representatives were the face of the company, and it was they who were directly responsible for the retention or loss of clients. The wonderful, personal service they provided led to close relationships with the library staff they served and made the demise of the company all that more painful on both sides. Similarly, in libraries, it is the staff who work closely with the faculty and students who represent the library to the parent organization and are largely responsible for its success and relevance.

But there is more to customer service than the day-to-day, face-to-face contact with those

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we serve. It involves the identification of pain points on the part of the client and development of services to alleviate at least some of the difficulties they face in their work. Just think about what openURL linking has done to streamline the research process for our scholars. In our current environment where more and more work and interactions are done online, libraries and companies must concentrate on virtual and self-service solutions for our users. Often this entails anticipating and solving future needs even before they are requested.

Collaboration

Successful organizations in our industry have one other thing in common; they often collaborate with like organizations, consortial networks, and even with competitors to establish standards and create efficiencies. I think of the important work done in the past by a combination of vendors and librarians on the SISAC, DLF ERMI, and Counter initiatives. Collaboration will become increasingly important in the near future with projects such as 2CUL, which aims to combine several technical services and collections functions of **Cornell** and **Columbia** universities. Collaborative purchases in the electronic environment are key to the continuation of resource sharing among consortia members and local networks. And I think that one area ripe for greater collaboration is that of metadata creation and sharing going beyond our participation in **OCLC**. With personnel budgets shrinking, the sharing of specialized and technical staff will also offer opportunities to collaborate for the greater good. Vendors and publishers, as well as libraries, must be prepared to support and participate in these collaborative efforts.

The Bottom Line

Companies and libraries must meet their budgets. In both settings, I have felt at times free to spend and at times very constrained to the point that it became difficult to meet our goals. Realistic goals and budgets must be set. In more than one case, the top leader in the company or library consistently failed to listen to the chief financial person in the organization. It's obviously prudent to be conservative in estimates of sales or price increases and then have some extra to spend at the end of the year. Libraries are businesses which manage millions of dollars, just as vendors and publishers; we are all accountable to our owners, stakeholders, administration, and our customers.

One thing I do know: the current fiscal crisis for libraries is still extremely serious. We can no longer pay the outrageous increases that a number of publishers insist on charging. And our budgets are finite. It does not matter how much content has been added to a particular package; we simply don't have the additional funds. These days the best many of us can hope for is a flat budget with no direct cuts. Without money for inflation, our buying power is, in effect, in serious decline. Reviews and cuts to e-resources and serials collections are and will be ongoing. If we don't work together to find

some effective solutions for realistic increases and pay-per-view/document delivery, our users will find other ways to obtain and share this material and we will all lose.

By the way, it surely would help in our industry if all of our fiscal years could align! Discounted sales of resources by publishers and vendors in December don't help me when my library's fiscal year ends in June and I don't know what surplus money I might have to spend.

In terms of the bottom line for library staff resources, the role of the serials vendor continues to be critical to the efficient management of our serials. As we are forced to live with fewer staff and to allocate staff to essential activities such as e-resource access and technological development, we need to manage as much of our collection as possible with the help of our vendors. We should always have the choice to deal directly with the publisher or work through our designated vendor or consortium. And we need to make sure that all parts of this scholarly communication chain remain viable.

Trust, Transparency and Respect

Sometimes in dealing with our legal counsel, we find it difficult to describe how our industry is based largely on trust – or at least it has been in the past. Publishers, vendors, and libraries have all worked together fairly successfully and openly. The SERU initiative has been one of the successes in the area of licensing, but how widely has it really been implemented? I am concerned now that I see this trust eroding more and more in today's financially precarious and increasingly litigious society. Just because the majority of our information resources and services are online instead of in print, we seem to trust each other less and less as we attempt to develop new, effective (but restrictive) business models.

I wish, probably somewhat naively, that all parties in the scholarly communication chain could work together more easily. Libraries, and thus our users, are being hurt by one-sided, exclusive agreements and by the withholding of content from what are judged to be competitive products. My view as a librarian is that once I have paid for content, whether leased or owned, my users have the right to view that content through whatever interfaces they (or the library on their behalf) select. If a vendor or publisher believes that they will drive greater sales to their own products by refusing to play with others, or by not divulging what content they actually cover, then I believe they are misguided. A recent decision on our part to switch products was partly in reaction to these types of closed business practices.

I do have one overall concern about the library profession that I'll mention here. I wonder why, as librarians, we are always having to fight to be respected. I've found this to be true whether I was working on a campus or at a commercial organization. There has been a lot of speculation that this is at least partially our own fault, but I don't see other professions having to work so hard to prove their value. I think that individual librarians are indeed respected by their faculty colleagues and their clients, but in general, libraries and librarians

are not viewed as vital parts of the organization. And to make matters worse, those of us who at times work for vendors and publishers are often viewed with distrust both by librarians (some of us have been accused of going to the "dark side") and our company colleagues.

Need for Market Research and Prioritization

A common theme that I have seen across all successful organizations is a deep understanding of the current and future needs of our clientele and decisions based on thorough market research. When we proceed on the basis of unfounded assumptions, we run the risk of ceasing to be relevant to the market(s) we serve. Our decisions need to be based on empirical evidence and on direct conversations with our users; these conversations must be ongoing. Advisory boards and faculty/student committees need to be consulted and listened to.

During more than one corporate acquisition in our industry, the clients were never asked about their needs and about what made the services and systems of the acquired company important to them. When **Swets** took over **Blackwell** and when **EBSCO** later acquired **RoweCom/Faxon**, excellent customer tools such as **Faxon's** Web-based Subscription Depot were summarily trashed, and personal service often went downhill. Many knowledgeable and dedicated account representatives were dismissed, to the clients' great dismay.

Clear priorities must then be set based on the directions outlined by our clients. These priorities have to take into account a number of factors such as the availability of financial and staff resources and the likelihood of success/profit of any initiative. And, most importantly, priorities must be understood throughout the organization and followed. If they are changed, this needs to be clearly communicated and sound reasons given for the changes.

Technology

Technology plays a growing role in all of the work that we do; it is an essential part of the service provided by libraries as well as vendors and publishers in the online environment. And technology development is expensive. We all need to make the technology investments necessary to keep abreast of the needs and expectations of our users. Truly innovative, new, vendor-provided library automation platforms are few and far between. Many of our industry discovery interfaces lag far behind those outside the library world. Libraries often limp along with older technologies because of budget constraints; campus administrations need to invest much more heavily in the development of new library/research technologies and tools. We in libraries look to our vendors to provide cutting-edge systems which will allow us to compete in the current information environment. I think that we need to be more aggressive in reallocating staff and resources to the purchase (or use of open source, which is far from free) and development of new technologies. And, at the same time, we need to remember that technology alone is not enough

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and that our professional expertise and excellent service are necessary to our success.

Organizational Culture and Staffing

Each organization I've worked for has its unique organizational culture, and these vary widely. What is most important is for the leadership to understand the culture they are working with. This understanding must be the basis of any change that needs to be undertaken. The disconnect, for example, between **Divine, Inc.** and its acquisition, **Faxon/Rowecom**, is legendary. **Divine** didn't understand about the personal relationships and excellent service so important to both the staff and clientele, not to mention the rest of the business. In general, corporate salespeople working with libraries need to understand the culture of librarians and the importance of relationship-building.

At one academic institution, **Brandeis**, the merger of the library and IT was far from a success; little attention was paid to the widely different organizational cultures of the two groups or to the morale of the library staff who felt that they were overtaken by the

IT organization and the CIO. Organizational culture varies widely between geographic areas as well; **Blackwell's** marketing culture in the U.K. was quite different from that of **Readmore** in the U.S., but as a subsidiary, we were forced to use marketing materials and language entirely foreign to our clients (one small example: "routing" became "circulation!") and could not seem to make **Blackwell** understand our very different market needs. And even in the U.S., at one point I remember being chastised by **Dawson** management in Illinois for using the word "client" instead of "customer" in **Faxon's** marketing materials.

Staff morale is such an important factor to the effectiveness of both libraries and companies, and yet it is so often overlooked. How we treat our staff, hopefully with respect and compassion, has such an important impact on their motivation and work. They must be seen as people with their own lives as well as work colleagues. Unfortunately, I have seen the ill effects of low staff morale at various library settings as well as companies suffering from the results of mergers and acquisitions. Leaders can do so much more to foster and improve staff morale, and we all have a lot more work to do in this area! One of the more difficult

challenges I find myself dealing with is how to make long-term staff still feel valued in this time of transformational change and shifting priorities.

One final note. I believe that all of these professional experiences together, both academic and commercial, have contributed to a much better understanding of the industry in general and have definitely enhanced the work that I do. I cannot understand the reluctance to hire good candidates because they come from "the other side." On the contrary, who could be a better collections librarian to negotiate with vendors than one who has been a vendor? And who better to deal with sales and customer services to the library community than one who has been a librarian?

We all have a lot of tough challenges, crises, and competition from outside the industry to deal with in the years ahead. Certainly working together, and I include libraries, publishers, and vendors here, we will be better able to find solutions to facilitate the chain of scholarly communication and keep us all viable, relevant, productive, and successful.

The Value of Experience

Column Editor: **Scott A. Smith** (Kent State University) <scott.alan.smith@comcast.net>

Earlier this year my longtime friend and former colleague **Forrest Link** invited me to contribute an article to an issue of *Against the Grain* focusing on an exploration of the boundaries between librarians, vendors, and publishers by those of us who have crossed said boundaries. I happily agreed to do so.

Forrest represents a small but notable group of professionals whose career trajectories evolved more or less along these lines: these folks earned their MLS, may or may not have gone on to work in libraries for some time, but eventually found themselves working for vendors or publishers. In this context "vendor" can mean book vendors, serials agents, or systems vendors. Many vendors have long sought to recruit librarians, either because their experience helps inform business practice, lends credibility to their enterprise, or both. In a few instances, such as **Forrest's**, members of this group have crossed back to the library side.

My experience mirrors that of a much smaller cadre: those of us who began our careers as vendors and only later returned to earn our library degrees. Another friend, **Steve Bozich**, now of **Midwest**, is one of only a few others I can think of whose story is similar to mine.

I spent nearly thirty years working for **Blackwell's**, initially assisting in the administration of the approval plan, and later serving as a regional sales rep and manager in various parts of the world. In my first years with the firm I was fortunate to work for **Don Stave**,

who along with **Oliver Sitea** created the approval program as we have come to know it for the **Richard Abel Company**. **Don** is a kind and generous soul who taught me much and was, as I think back, remarkably tolerant and patient. **Don** was working as a librarian in **Washington State** when **Dick** recruited him. Another former boss and alas departed dear friend, **Jamie Galbraith**, worked as a librarian before going on to a remarkable career in bookselling.

Many of these people belong to a generation whose professional careers were shaped by an unprecedented expansion of higher education and a corresponding, dramatic growth in the businesses that serve the academy. Companies like **F. W. Faxon** dominated their markets in the 1970s and seemed both permanent and indestructible. There were dozens of book dealers, serials agents, and systems vendors, large and small; their numbers assured employment for many. Who today remembers **MacGregor, Boley, Ballen, Taylor-Carlisle, Franklin, Stevens & Brown, CLSI, NOTIS, or Data Phase**, let alone **Faxon** or **Abel**?

The firms that survive were able to do so, in part, because of their ability to anticipate trends, to innovate, and to re-invent in the face of increasingly rapid changes in technology, an accelerating migration from print to digital, and a library market shaped by new forces and new players. Examples of such companies are **EBSCO** and **Innovative Interfaces**.

In light of these myriad changes, I decided to build upon my first career's experience and

return to library school.

I graduated from Kent State's School of Library and Information Science in May of this year, and I add my voice to this discussion as someone who represents vendors and librarians.

With that said, I'd like to offer the following observations:

1. There is a great deal of talent out here. **Kent's** program is perhaps unusual in that there are fewer of what are politely referred to as "returning students" (i.e., old coots like me) and a lot of young and very bright people coming out of library school. **Stephen Abram** often talks about this generation and their skills, abilities, and predispositions. Their biggest disadvantages are the awful state of the job market, their sheer numbers, and their lack of experience. Listservs are abuzz with postings from frustrated job seekers struggling even to get initial interviews.
2. Libraries are overwhelmed with applicants. This is pretty obvious and not all that surprising. Combine lots of recent grads and scarce job opportunities, and you get a flood of applications for pretty much any job out there. Unfortunately, this leads to an inevitable process of elimination which by

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