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Biz of Acq — Online Acquisitions Tools: What are Library Service Providers Thinking?

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Vendors and library service providers collaborate with librarians across the world to incorporate their collection development and acquisitions workflows into various online bibliographic databases and ordering tools. As Collections Consultants with **Ingram Coutts**, we often hear the joys and pains from libraries using these ordering platforms. A reoccurring question is, “What were you thinking when you designed this?” Sometimes this is a positive statement, as in, “Did you truly build this just for me?” or, “Is this the first stage in something great to come?” This can also be a negative statement, as in, “Why didn’t you take our institution’s perspective into account when you made this change?” or, “I’m worried this development will be more disruptive than helpful.”

We regularly act as liaisons between librarians and our company’s product developers, communicating the wants and needs of librarians to those who have the tools and know how to make things happen. We decided to go directly to the experts and get their views on product development and what library service providers are really thinking when changes and enhancements are made to their platforms.

The discussion below is the result of telephone conversations with **Bob Nardini**, Vice President of Product Development at **Ingram Coutts**, and **Andrew Pace**, Executive Director, Networked Library Services at **OCLC**.

SF: Tell us about the acquisition tools you develop for libraries using your services — why these products and how do they work?

AP: For the purposes of this conversation I’ll talk primarily about WorldShare Management Services. Part of “why” here is discovering gaps in our approach to a networked library service, particularly when dealing with library collections. You can have ILL and cataloguing services and now discovery services, but what about the actual collection management? Why hasn’t that moved up to the network level? Part of the challenge is that integrated library systems were designed before cloud computing, before the Internet had even become part of library environments. The challenge in a nutshell is that integrated library systems were incapable of dealing with the changing nature of collections and the changing needs of patrons and were incapable of dealing with

the kinds of collections libraries were spending the majority of their money on.

Before coming to **OCLC**, I was at **NCSU Libraries** working in IT on systems problems. We had just launched a new discovery interface and were struggling with what we were going to do about the ILS — essentially a dinosaur. This was the fall of 2007, and I got a glimpse at **OCLC** of the possibility of moving these things to the cloud network. It was then I had an epiphany — we could take the ILS apart and put it back together with networked technology. This was the idea when I joined **OCLC**; we needed to dismantle and rebuild with 21st-century technology.

BN: The purpose of OASIS is simple — it allows customers to do business with us. It allows our customers in academic libraries around the world to find the titles they need — whether known or unknown — and place the order. It is a simple concept as there are two basic points that matter: find the title and order it. But there can be many steps in between searching and ordering, and we must give libraries many different routes from point A to point B with lots of substations along the way.

SF: We know that these different routes to an end can result in a lot of feedback from customers on how the product can be enhanced. How do you decide which enhancements to pursue? What factors do you need to take into account before pursuing an enhancement?

BN: We wish every library in the world had the same workflow and placed orders in the same way with the same systems and the same local data, but of course this is far from the case. Libraries have all sorts of ways to order. Before working on OASIS, I had a similar role with **YBP** developing GOBI functionality, so I’ve had a hand in both the major systems academic libraries use to buy books. Whenever a change is proposed, what do we do next? Well, we think about various categories that could influence the decision: will it create more sales? Direct or indirect sales? Which customers are asking for this change (if any)? Are they large? Are they new? How will this change fit into workflow for other libraries? Will it benefit just a small number of libraries or a larger number of libraries?

And then you have to think about the level of difficulty. Here is where we see lots of back and forth between library and vendor, and between vendor rep and IT. How hard would it be to make this change? How long will it take? Many proposed changes seem simple but turn out to be not so simple, and those of us not on the “tech” side may not be aware of extent of the difficulties. Just recently I asked IT to change some wording on OASIS. It turned out we had to wait for a bigger, formal release because that sentence was tied to a piece of underlying code, while other wording wasn’t and could be changed right away. Who knew? This is a small but revealing example of how things go. Obviously the easier the change the more likely we are to do it.

We also have to think about whether the competition is doing this. How will this help us in the marketplace strategically? Does this fit the functionality that we already offer?

AP: We respond to requests for enhancements in a variety of ways. One thing that helps is using a specific development methodology. Rather than a waterfall development methodology used in the past, we’ve moved to an agile model where we have 2-3-4 week sprints of functionality development. We have 158 customers using WorldShare Management Services in seven countries and are introducing 20-25 new features every quarter, pushed out automatically. In the last release in August, 83 percent of new features were the result of direct feedback from our current user base.

Another consideration is critical mass — is it one library or several libraries asking for this feature? We have 25 years of local system development to catch up with, so there is always plenty to do!

OCLC’s clarity of mission helps with business decisions about when to help and what can be done. Starting from scratch also helps with overcoming barriers. Our main question is will there be a good “network effect” possibility with this change? We are also looking at the market reaction to change and adjusting if needed. We regularly run into localization and segment requirements, public libraries vs. academic libraries, for example, and the need to carefully balance all of those things. Part of

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our strategy is also planning a “careful march” to measure the impact of change and adjust quickly when necessary.

SF: *How do you see new acquisitions models developing? It seems like there is a bit of push-pull happening, with libraries sometimes driving development and vendors sometimes pulling customers along.*

AP: Often, the second mouse gets the cheese. Some people wait to see what the service provider’s approach is; some people wait to see if an effort will fail or not. When moving library services to the cloud, some people didn’t jump on board immediately because they were so entrenched in the model of local systems. Now **OCLC** is comfortable as a market leader because we had libraries willing to take chances with us. I’d say we’ve had about 50/50 push-pull in developing WorldShare Management Services. Libraries have been doing what they’re doing for long enough, they knew where the inefficiencies were and knew things they wanted to change, so there was a bit of pull. But some of it was **OCLC** seeing the network effect of sharing and discovery and trying to push and apply that network effect to other areas. The push and pull became both market driven, because we try to do a good job of listening to what the market is saying (especially the early adopters), but it was also technology driven when we saw the opportunity for network effect.

BN: This is hard to answer in any absolute way. Both situations happen — the push and the pull — it really depends upon the context of a particular change. When it comes to eBooks, for example, particularly in early days, **Ingram Coutts** tried to do the “pushing” to introduce a lot of ways for libraries to incorporate their purchasing of MyiLibrary eBooks side-by-side with print in a coordinated way. **Ingram Coutts** was the first vendor to offer a fairly strong set of services allowing libraries to do that; we were ahead of most of the libraries on that, though a few institutions were clearly pushing for this. Now that the number of libraries shifting budgets from print to eBooks has grown, libraries are now doing the pushing toward various new ways of supporting PDA/DDA. Both push and pull can happen at the same time, and there can be a shift from one to the other. In my earliest GOBI days, the Web was just becoming a widespread tool for purchasing. By putting GOBI on the Web we were introducing libraries not only to GOBI, but to the Web in general. In those early days, it was the vendor doing the pushing and many libraries were not happy about this new way of going about their business. Those experiences were not always pretty, but now it’s hard to imagine life without a Web-based ordering platform.

There are, though, a small number of libraries, for whatever particular local reasons, who want to partner with vendors to push

Bob Nardini is Vice President, Product Development at **Ingram Coutts**. He worked in both public and academic libraries prior to 1985, when he took a job in the academic bookselling industry, where he has been ever since. In 2007 **Bob** joined **Coutts** and since then has been involved in several areas of the company’s activity, especially development of the OASIS customer interface and the MyiLibrary eBook platform. **Bob** holds an M.A. in History from the **University of Virginia** and an M.L.S. from the **University of Toronto**. He lives in Niagara Falls, New York and crosses the border each day to work in Niagara Falls, Ontario. 🌲

radical changes. When one library pushes the vendor to do something and we do it, we can then spread this functionality across the library world, and not just in one market here and there. That is certainly how it went with integrating eBook and print PDA. We were pushed heavily and smartly by **Arizona State University**. They pushed us, and we pushed out into the larger world the changes they wanted us to develop. And now for years many libraries have benefited from the services **ASU** pushed for.

But we’ve found by now many libraries have developed workflows so intertwined with their vendor’s systems that it has become more difficult for a library, particularly a larger library, to move than it used to be. That’s one of the reasons vendors develop the systems we do, to get as close as you can to your customers.

SF: *The biggest shift in the monograph acquisition world in recent years has been incorporating eBooks into collection development. How do multiple formats, and multiple platforms, play into platform development decisions? Why are eBooks such a disruptive factor?*

AP: We know WorldShare Management Services has to be able to manage e-content as well as print content. The challenge here is that e-resources management is fraught with chaos; it’s fraught with the near-impossibility of prescribing or proscribing workflows. We were dismissive of print serial management at first because we wanted to make sure we were managing e-content as well as we had historically managed print (nevertheless, we developed print serial management because the market demanded it). Here is where the cooperative management of knowledge bases is an asset. Someone in traditional monograph acquisitions can query a database that alerts the library of the existence of an eBook from various providers. The collection development policy can also drive these alerts. **OCLC** is the only provider building discovery, link resolver, technical services, and cataloguing around a single global knowledge base from the outset. Libraries want to be able to use applications around a shared knowledge base; they don’t want to be using multiples. Otherwise they would end up cataloguing the same thing seven times — a lot of redundancy. A knowledge base is central to managing collections as much as WorldCat is central to managing physical collections. With local systems, there is no opportunity for sharing vendor files, as traditionally libraries enter the people they do business with system by system by system.

Using WorldCat as the database of record is a massive example of how doing something to scale allows you to do it differently.

BN: For years our company’s eBook strategy was focused on our own MyiLibrary platform. But now that the competition among academic eBook platforms is so intense, we’ve changed that strategy. There is no one platform with all the best features and all the best titles to itself. Libraries have made their choices to prefer this platform or that platform, and as I’ve already said, it’s not so easy to change course. Now we are integrating other platforms into OASIS, side-by-side with MyiLibrary. **EBSCO** was the first, our work with **EBL** is well underway, and others will follow. So, now OASIS is not only a way to integrate print and eBook purchasing, but also a way to integrate different eBook platforms.

SF: *Dismantling and rebuilding is an important part of maintaining relevant products. How do customers respond to radical changes?*

AP: This is the “WorldShare Paradox”: providing libraries a platform on which they can do the kind of work they’re used to doing while simultaneously allowing them to do their work differently so they can do different things. Change is hard but I’ve seen it embraced with enthusiasm by hundreds of libraries and thousands of librarians and library staff. **OCLC** wanted to leverage every method possible to foster cooperation within each library and amongst all libraries. It is overstated that libraries don’t want to change. They want to change in ways that make sense, make them more efficient, and save money. Libraries will make changes if doing things differently allows them or their library to do different things. Our goal is to create efficiencies in the library that will allow libraries to use their time in better ways. In collection management, libraries are spending more time on things that are unique about their collections and less time on things that are commoditized. We have to find areas in which there is a suitable investment for libraries to try something new. In early days (way back to four years ago) it was about finding early adopters, people willing to take the plunge into something new. As they say, everybody wants to go to heaven but no one wants to go first.

BN: Sometimes customers realize change is necessary and they’re willing to give us a lot of leeway. They know it’s not an easy thing to do. You’re running multiple systems at once because you can’t stop system A while you’re building or rolling out system B. Both have

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to keep going. Then you shift from one to the other. It's very difficult and doesn't always go as you would like. Many customers are understanding, but others are less so. In the early days, prior to any of the kinds of systems we've been talking about, we would send sets of microfiche to libraries once a month. These would be read by libraries to find out what books were available at what price. It was a snapshot of our database. Later, some people weren't happy about getting rid of microfiche, and so we continued to mail it to a few libraries for a couple of years into the online era. But we had to change, and it wasn't always pretty during those transition periods. Most librarians understood the need, but not every librarian you interact with over the course of these transitions is a happy camper. Obviously the smoother something goes the better the conversations are. As long as libraries know we are working

Andrew K. Pace is Executive Director for Networked Library Services at OCLC, where he is directing projects to move library management and discovery services to the network level. He was formerly Head of Information Technology at **North Carolina State University Libraries**. Pace is a Past President of the **Library and Information Technology Association (LITA)**, a division of the **American Library Association**, and serves on the **NISO Information Standards Quarterly** editorial board. 🐼

hard to address any problems that arise, we have the room to do what we need to do.

And sometimes what we need to do, instead of the usual incremental changes, is to start again, with a system that's been entirely rewritten. With any system, past a certain point, incremental change isn't the best approach. You have too many grafts, too many workarounds. Having gone through this several times, I think that's always been the right decision in the end, although not everyone among the customers would necessarily have agreed at the outset.

SF: Any closing comments?

AP: This is an exciting time of cooperation between libraries, service providers, and dotcoms! The general ecosystem of library service providers and Web providers is changing rapidly and has been important in getting us out of the walled garden era of the early 1990s.

BN: To me, looking back, the whole period since the early 1990s has seemed like a sprint. There hasn't been a single day where I've been able to think, "OK, finally done." You are always moving, always weighing, always making choices, always trying to listen — and to find the right questions. 🐼

Marketing Academic Libraries — Marketing is Communication With Our Users

Column Editor: **Matthew Ismail** (Director of Collection Development, Central Michigan University, Park Library, 204B, Mount Pleasant, MI 48859; Phone: 989-774-2143) <ismailmd@cmich.edu>

What is marketing and how do we apply it to academic libraries?

If you're anything like me, these two questions don't exactly play to your strengths.

I say "if you're anything like me" because I suspect my background is pretty typical for academic librarians. BA and MA in Middle Eastern History. A couple more MAs dealing with European History. After grad school I've worked twenty years either as a reference or a collection development librarian. I published a book in 2011 called *Wallis Budge: Magic and Mummies in London and Cairo* concerning the legendary Victorian Egyptologist **Sir E. A. Wallis Budge**...

You get the picture. Lots of reading and writing in the humanities and social sciences. Lots of building collections and helping students and faculty with their research. No work experience outside the academic world. No marketing experience — like most librarians.

The idea for this column was suggested to me by **Katina Strauch** at the recent **Charleston Conference** because we both agreed that academic librarians can no longer assume that our users know what resources and services our libraries can offer them (besides study space!). Indeed, even as early as 2005 **OCLC** found that 90% of students reported starting their research with either Google (68%), Yahoo (15%), or MSN Search (5%). Only 2% of students said they began their research on the library Web-page (**OCLC** 2005). When I was in college in the early 1980s, the library was the default

source of information for coursework. The fact that students now mostly think of Google when they have information needs suggests that librarians have some work to do.

So, back to the basic question: What is marketing, anyway, and how does this differ from the activities of the *Mad Men* of advertising?

Marketing refers to the process of preparing your product for the marketplace. It involves understanding who your potential customers are and what they want to get from your product or service. Colors, logo, and other design elements help to align the image of your product with the interests of your target audience. It is marketing that defines your brand and attracts the market share you want.

Advertising is the process of making your product and service known to the marketplace. It is essentially spreading the word about what your company has to offer. While marketing is the way in which you convince potential buyers that you have the right product for them, advertising is how you communicate to them the existence of that product. (Lovering 2013)

So, marketing is a larger process than the advertisements you place and the pamphlets you distribute. Yet, even some business folks may not know a lot about marketing:

Let's face it, to the average business person, marketing equals promotion.

Marketing is what you say and how you say it when

you want to explain how awesome your product is and why people should buy it.

Marketing is an ad. Marketing is a brochure. Marketing is a press release. And more recently, Marketing is a Facebook page or a Twitter account. (Brenner 2012)

This confusion between marketing and promotion is pretty typical in libraries. Library brochure at Circulation Desk? Check. Library homepage with a news and announcements section? Check. Distribute bookmarks to freshmen at orientation? Check. Facebook page with announcements about the library's upcoming workshops and activities? Check. We've got marketing.

But marketing, as some experts know, is an investment quite beyond creating a few brochures. "There is so much stuff going on in a modern university library, and the patron audience changes so often, that personally I have wondered how anyone can claim success without a huge marketing effort," says **Donald Dyal**, Dean of Libraries at **Texas Tech University**. When **Dyal** arrived at **Texas Tech** in 2001, he told me in an email in December of 2013, he created a Department of Communications and Marketing. This department is staffed by a Director, an Assistant Director, a graphic designer, a photographer/videographer, and,