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Both Sides Now: Vendors and Librarians--It's In Everyone's Best Interest to Require an Agenda to Make an Important Meeting with a Vendor More Productive

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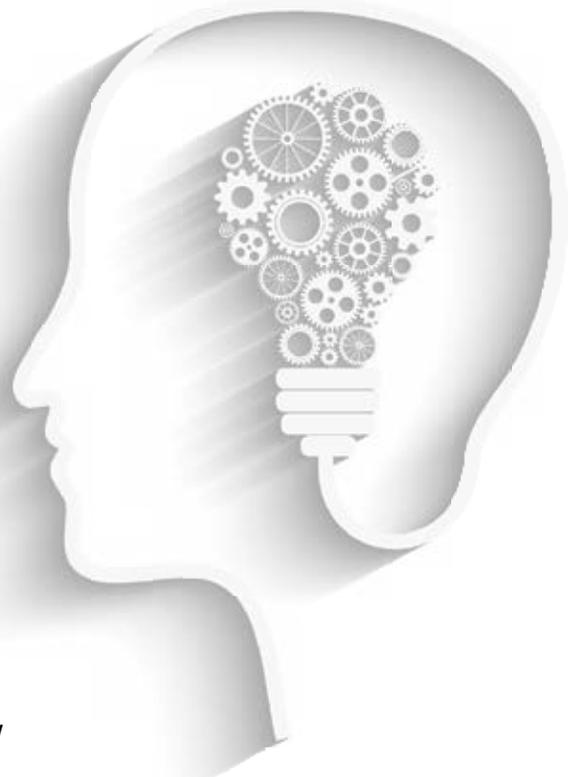
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Both Sides Now: Vendors and Librarians — It's In Everyone's Best Interest to Require an Agenda to Make an Important Meeting with a Vendor More Productive

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On a sunny afternoon in January, Tom, the regional sales rep for a major information industry aggregator, enters a University library. Set on a hilltop in Virginia, the view from the top of the library steps of the surrounding countryside can be described only as spectacular. Tom takes in the sight of the distant snow-capped mountains as he stands on the marble steps leading into the library. Tom feels quite fortunate to have this job that takes him to academic and medical libraries within the Mid-Atlantic States.

Today, he is meeting with Meg, the Reference librarian at Mountaintop College. Although they have spoken many times on the phone, they have never met face-to-face. He is excited to talk to her about the company's Whiz Bang database product. According to the notes contained in Tom's internal contact management database system written by the previous rep who handled Mountaintop, Meg seemed very interested about this product when

it first was introduced less than a year ago. At the time, she sent in an inquiry by email asking for more information about it. Although there has been significant interest about the product from not only Meg but also from many other libraries, sales have been sluggish.

Tom is new to the company, having been hired in November, but has been in the industry for over ten years. In preparing for the visit, Tom has checked his internal contact management database to learn that Meg's library has been a customer for many years. Moreover, they have been pitched a number of products over the years, and although Meg and her boss, Alice, have always been open to learning about new products, they continually stay with the same subscriptions they have always had since 2003. Tom feels that the database he wants to speak about today will be the leverage he needs to get the library

to spend more money with his firm. He truly believes that this college library needs this database.

Given that the company wants more of the Whiz Bang database sold, they have decided to "re-launch" the product. The marketing department has provided all the reps with product training and also provided them with a link to a URL with a slick presentation on this offering, and, in addition, the sales manager has even offered the reps an extra monetary incentive for every sale made within the next 60 days. Tom's shoes are shined, his pants are neatly pressed, and the new, somewhat overpriced blue shirt he's chosen to wear today makes him look pretty good, in his opinion, as he checks out his own image in one the library's many mirrored walls as he ascends up the incredibly long and wide staircase.



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As always, Tom is early for an appointment, and as he waits in front of conference room “B” on the third floor of the library gathering his thoughts he is confident in the salability of his product and even more confident of himself in presenting it. Given the warmth of the afternoon sun as it pours through the big windows in the old building and having to walk up to the third floor, he wipes away a few beads of sweat from his forehead. At that moment, the door opens, and Meg comes out to greet him and ushers Tom into the room.

Tom has never met Meg, but when he notices Alice the Library Director in the room he is happy to see her again since he has known her for many years from his previous job at another company. Also seated in the room are three reference librarians, whose names are Earl, James, and Juanita. Tom has never met any of them before.

After a brief round of pleasantries and introductions, Earl, the most senior of the three librarians, launches into an unpleasant assessment of Tom’s company as it relates to technical service issues that, in his opinion, have been unresolved for well over ten months. As Earl cites chapter and verse about the “tenuous situation” he now deplures, the smiles of the library staff from five minutes ago have turned into frowns, and eye contact between them and Tom has quickly vanished, making for a most uncomfortable conversation.

As Earl is speaking, Tom is feverishly writing down the litany of complaints while at the same time trying to remember if any of these issues were mentioned in the contact management system that he now knows that he should have reviewed more carefully. He vaguely remembers that there was a note about an issue which occurred a year ago about some new software developed by the company that caused some glitches in the search engines of some of their databases, but he was under the impression that all this had been resolved months ago. “*Au contraire, mon frere,*” as they say in Paris or “Not really!” as Earl said at this meeting.

Tom is now on the defensive. He promises to look into this matter ASAP. Alice, sensing that Tom’s blue shirt is on the verge of being ruined due to excessive perspiration and realizing that he has no clue how to respond with definitive steps to solve the problem, steps in and mercifully brings the discussion to a halt. Tom promises to contact his technology department to find out what went wrong and commits to an answer within a week. Earl registers his skepticism on a quick resolution, but Alice once again comes to Tom’s rescue by telling the group that when Tom worked for another database provider his response time to resolving issues was impeccable. Earl makes it clear that he is not impressed with that, which elicits a cold stare from Alice. The meeting ends on less than a high note.

As Tom slowly walks dejectedly down the same three flights of marble stairs he so

confidently marched up with a spring in his step just a long hour ago, he couldn’t help but replay in his head the events that had just transpired. He quickly realized that he had not done his homework in fully researching the facts about Mountainside, while at the same time, the library staff is getting an earful from Alice in conference room “B,” who tells them of her displeasure in the way Tom was treated at that ill-fated meeting.

I am reminded of the Rolling Stones song, “No Expectations” written by **Mick Jagger** and **Keith Richards**, which goes, “So take me to the airport, and put me on a plane, and I’ve got no expectations, To pass through here again.” A good salesperson knows that to be successful, they have to keep in contact with the customer base throughout the year, which means that Tom will most certainly have to “pass through here again.”

Both Tom and Megan had expectations, but they both made the fatal error of not sharing those expectations with one another. As a result, Tom not only did not get the ball rolling to begin the sales process he was hoping for, but also Megan was embarrassed to have to be bailed out by her boss in an unpleasant meeting while, at the same time, being blind-sided by Earl.

Had Tom and Megan used the mutually beneficial procedure of agreeing to an agenda **PRIOR** to the meeting, then this type of missed communication and unpleasantness could never have occurred. Here’s how the above stated meeting should have played out:

It begins by Tom sending an email to Megan a few weeks before the scheduled meeting stating that he will be visiting her library on January 12th at 2:00PM. He then says that he will be there to speak about and give a brief demonstration about the company’s re-launched Whiz Bang database. By doing so, Tom is very clear about his intentions for this meeting. In the same email, he will also ask if there is anything else Megan would like to discuss at the meeting.

Before Megan replies to Tom’s note, she will speak to her colleagues to tell them that Tom will be there on the 12th to talk about Whiz Bang and to let her know if there are any issues that need resolution vis-à-vis Tom’s company. That’s when Earl would tell Megan of his dissatisfaction and would most assuredly ask her to add that item to the agenda. At this point, given the importance of the issue under scrutiny, hopefully being resolved, Megan may find that the library director may also want to attend. As a result, Megan’s email response to Tom could be:

“Tom, it will be great to see you on the 12th and I’d like to know more about the Whiz Bang database, but I wanted you to be prepared to talk about this nagging issue about your technology that has gotten many people in the library upset. We really need your help in resolving this thorny issue. Given its importance, our library director, Alice, is expecting to join us along with some of the library staff.”

Tom now knows that he must not only talk about Whiz Bang at the meeting but also be

conversant enough to help solve the technology issues seemingly plaguing the library staff’s use of all his company’s databases. He therefore speaks to the head of technology that has developed a solution to the problem, and that person promises to join Tom at the meeting. He also speaks to the VP of sales who agrees to be there, as well. And finally, Tom will carefully review all the notes in his contact management system to understand the length and breadth of the problem referred to by Megan.

Armed with this information, Tom then responds to Megan thusly: “Megan, we are very concerned that you are still having technology issues. To help solve your technical difficulties, I am bringing Victor, our technology VP, who assures me that the problem is fixable. I am also bringing Marianne, our VP of Sales, to the meeting. Before I say one word about Whiz Bang, Victor, Marianne, and I want you to be totally comfortable with our solution to the tech issues you are encountering.”

By sending this response, Tom has totally snatched victory from the probable jaws of defeat he would have had to endure had he not sent the clarifying agenda. He has set the tone and scope of the meeting by doing the following:

- Stating that his company is concerned about the customers’ issues and not just there to sell another product,
- Leveling the playing field so that there are senior executive types on both sides of the table, ensuring a solution amenable to both parties,
- Neutralizing possible loose cannons like Earl, and
- Creating the necessary groundwork to ensure a successful meeting.

Megan responds by approving the agenda, and both sides have made progress even before Tom and his entourage set foot in the library. One of the most crucial steps in the buying and selling process is making sure that the salesperson and the information professional are on the same path, travelling to a mutually acceptable destination. Many a sale has been lost because the sales rep and the customer had totally different views of the scope and outcome of the planned meeting.

The moral of the story is that if you have expectations as to the outcome of the planned meeting, be it salesperson or customer, if you don’t share those expectations with one another they are as good as No Expectations! 🐼

*Mike is currently the President of **Gruenberg Consulting, LLC**, a firm he founded in January 2012 devoted to providing clients with sales staff analysis, market research, executive coaching, trade show preparedness, product placement, and best practices advice for improving negotiation skills for librarians and salespeople. His book, “**Buying and Selling Information: A Guide for Information Professionals and Salespeople to Build Mutual Success**” is available on Amazon and Information Today Websites. www.gruenbergconsulting.com*