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Vendor Relations Strategies for Libraries

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The library-vendor relationship is one that is built on interdependence. Ideally, it is a mutually beneficial relationship in which each party informs the other to improve resources and services. However in some cases, the time required to create and maintain these connections paired with differing priorities and goals puts a strain on such relationships. Libraries may find themselves overwhelmed by a perpetual barrage of information, and limited bandwidth and resources with which to devote to vendor relations. While recognizing that libraries need access to information resources provided by vendors and that vendors need to sell their resources to libraries to be profitable, how can libraries manage vendor expectations and still cultivate healthy relationships?

In order to shape the library-vendor relationship in a manageable way, the **Montana State University (MSU) Library** recently adopted its own set of Vendor Relations Guidelines to communicate its preferences, interests, and priorities. The goal of creating these guidelines is to promote transparency, encourage understanding, and make optimal use of time and resources spent with vendor-library interactions. This paper presents challenges with library-vendor communication and outlines solutions developed by **Montana State University Library** to address these challenges.

Challenges

Montana State University (MSU) is a mid-size, land grant, Carnegie-classified research intensive/very high research university. The **MSU Library** supports the education and research of its students, faculty, and staff with a robust collection of information resources spanning a variety of disciplines. Two librarians and two staff in the Collection Development (CD) department correspond regularly with vendors to learn about new products, procure resources, troubleshoot electronic access issues, and process renewals or cancellations. In the past couple of years, the CD department has broadened the scope of its work to include the implementation and maintenance of a discovery services product, creation of an institutional repository, acquisition of eBooks, creation of a program for Demand-Driven Acquisitions, reorganization of the department to include interlibrary loan, and establishment of an online database of sounds from nature. As a result of the increased breadth of our responsibilities we have less time to devote to working with vendors. Consequently, the **MSU Library** created a set of Vendor Relations Guidelines in the summer of 2015 to foster fruitful relationships that hopefully satisfy both the library and vendor within the time allotted by the library.

One of the greatest challenges that the CD department faces when working with vendors is managing the many forms of communication, including telephone calls, in-person visits, postal mail, email, and fax. These communications tend to increase close to professional conferences so that vendors can plan in-person meetings. Some vendors send the same invoice both electronically and in postal mail resulting in multiple viewings and time spent reviewing the same information.

Another reality is that some vendors assign multiple representatives to our library: a vendor may have one representative for eBooks, another for serials, and yet another for databases. Having multiple representatives means a multiplication of communications from these vendors and increased record keeping for the library to keep these contacts all straight.

Communications from vendors may have a mixture of "essential" communication (e.g., an invoice that is due, an update to a license agreement, upcoming database outages) and "non-essential" communication (e.g., new product features, vendor booth information at an upcoming conference, company newsletters). It can be challenging and time consuming to separate the essential and non-essential communication. Additionally, even some essential communications, like database subscription renewals, can be overwhelming based on the vendor's desire to speak at each renewal to review the library's account and promote possible additions or upgrades. With hundreds of renewals each year, talking with vendors about every renewal is not possible.

A final concern is that vendors often communicate with multiple employees in the department. In some cases, vendors send identical inquiries to multiple staff members. This results in inefficiencies within the department: two people may spend time answering the same question; they may reply with conflicting responses; or, they may both dismiss the communication, assuming the other will handle it.

Compromises and Solutions

The CD department at the **MSU Library** developed Vendor Relations Guidelines to improve workflow and optimize time spent dedicated on vendor relations. These strategies combine three approaches: our own data management, internal departmental communication, and how we let vendors know about our communication preferences. Ultimately, these strategies have afforded us the ability to balance time across projects and manage librarian and staff expectations about our approaches to vendor interactions in relation to other areas of work within the department.

Vendors often share quite a bit of information over email. This can mean a high volume of incoming messages. In order to track and manage the high-volume of vendor communications, members of the CD department set email rules to sort incoming messages into folders by vendor. Email management requires discipline and persistence. This small organizational strategy, though, allows for easy retrieval and reference that consistently benefits Collection Development.

Vendor communications often include valuable information, such as vendor representative contact information, subscription data, license agreements, and invoices. In order to manage the data associated with vendor communications, the CD department employs **ProQuest's** 360 Resource Manager for Electronic Resource Management (ERM). At one time, this information was tracked within a locally housed spreadsheet on a shared network drive. Today, our vendor-hosted ERM system offers the data fields and backup solutions we need in one, central location. Like most ERM systems today, ours allows for logging itemized payment information, tracking subscriptions, licenses, and notes. In addition to these features, perhaps one of the most valuable tools is the ERM's ability to track multiple contacts per provider. Each contact may be assigned a role such as a contact for billing, support, sales, etc. As vendor representatives turn over, ERM systems serve as a valuable central repository for the most current vendor information.

Contact methods and frequency vary across vendors. Since implementing our Vendor Relations Guidelines, the CD department relays communication preferences to vendors to manage expectations for our availability. Starting in the summer of 2015 when we implemented the guidelines, we convey these preferences to our current vendors as renewals or other contacts occur. We let new vendors know about these preferences at the beginning of new relationships. The goal of setting honest communication boundaries based on our bandwidth is to establish meaningful connections with vendors based on an understanding of our needs. Email is our preferred means of routine interaction because it allows for including multiple parties, tracking correspondence, and improving time management. While some vendor representatives prefer telephone conversations, the time allocated to telephone calls detracts from other responsibilities for our CD department. As such, we encourage and conduct routine communication via email, and reserve telephone calls for critical access issues. Email is a mechanism for inclusive and transparent project management.

The **MSU Library** Collection Development department has four members regularly communicating with vendors. In order to mitigate confusion about communications

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and to promote transparency among team members, the CD department uses a shared email alias for vendor contact. This shared email address functions like a listserv and copies multiple members of Collection Development on communications. With this email address, we receive both automated messages and vendor representative communications. The intention is to minimize confusion about vendor contact, reduce email forwarding, and to include pertinent parties in conversations from start to finish. Using a shared address requires that we have clear internal workflow indicating who follows up on what pieces of information shared by vendors. However, additional workflow processes with *trello.com* facilitate next steps and project management as action items are created.

Vendors plan site visits to share new product information, review accounts, and solicit product feedback. These visits are a chance to learn more about a company's business model, make meaningful connections, and to evaluate existing subscriptions or consider new resources. When a company has multiple vendors representing different product types this can mean multiple vendor visits per year. In order to manage a burgeoning visitation schedule, the **MSU Library** encourages vendor visits biennially. This standard is applied to all vendors with the goal of maintaining consistent and fair practices to cultivate vendor relationships. It also helps us relay a realistic and manageable schedule to our liaison librarians.

We also convey to our vendors that one of the most helpful interaction points with them for our library is the opportunity to understand more about our existing subscriptions and owned products to promote their use to our patrons. While vendor representatives frequently advertise new products during site visits, quite often ongoing vendor support is priceless. To maximize the value of current subscriptions and provide quality service to patrons, it is important for librarians and staff to become familiar and comfortable with subscribed products. Therefore, we encourage vendors to provide quick video tutorials, training webinars, and responsive customer service that reinforces the value of existing subscriptions, in turn fostering trust, a positive user experience, and good product usage. Creating time for patrons, librarians, and staff to become familiar with the functional aspects of product platforms, or new upgrades proves beneficial and is less time consuming than costly site visits.

Finally, caller ID on our library telephones helps us manage our vendor communications. When facing challenges like trying to troubleshoot a broken resource or negotiating a contract or having a colleague in your office, caller ID can be a big time saver. It allows us to answer a support-case call or to decline an unexpected contact. Likewise, some vendors have disregarded our communication preferences, in which case caller ID can provide the vendor an opportunity to connect with your voicemail if you are otherwise occupied.

against the grain people profile

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MOST MEMORABLE CAREER ACHIEVEMENT: Creation of Orange Grove Texts.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: All digital but not all open.

Attitudes from the Library Community

For more context into how other libraries approach vendor relations, we conducted an informal survey of librarians in June 2015 on Serialst, hosted by the **North American Serials Interest Group (NASIG)**. Followers were asked:

> "Have [you] developed any policies or guidelines for communication with vendors? Between on-site visit requests, telephone calls received, and emails received from vendors, I find time-management to be challenging around these relationships. To be consistent and clear with vendors, I'd like to develop some policies, which might make this communication less time intensive. For example, might we limit vendor visits to a specific month or two of the year or only when we request an on-site visit? And, could we say we prefer email to telephone communication? I realize vendors have their own time challenges and needs to communicate so I want to respect that. How do others manage the communication relationships with vendors?"

Responses varied with many librarians noting that vendor representatives are required to promote and market their products as a part of their job responsibilities. Some libraries suggested they receive better pricing when they have regular interactions with vendors to foster positive relationships. Others indicated that they prefer vendor-initiated contact when it involves customer service and training opportunities rather than possible new purchases. Some respondents actively let vendors know their preferred communication preferences and these libraries appreciate it when vendors respect these wishes.

Next Steps

Vendor relationships serve a valuable role in support of libraries. As library goals and responsibilities evolve, reflecting on vendor relationships may highlight opportunities for new communication methods or data management techniques to manage workflows. We share our experiences with the hopes of engaging in a broader discussion focused on improved understanding and mutually beneficial library/vendor relationships. As noted earlier, we established the Vendor Relationship Guidelines with the goal of setting honest communication boundaries based on our bandwidth is to establish meaningful connections with vendors based on understanding of our needs. Ideally, we would take vendor needs and challenges under advisement in setting these policies.

A cursory gauge of library community attitudes on the Serialst provides some sense of what is happening in libraries and communities. From here, we intend to conduct two additional, broader surveys of the community for analysis and broader dissemination: one survey for libraries and one survey for vendors. The results of this survey will be shared at the **2016 Electronic Resources and Libraries Conference**. Ideally, libraries will convey their challenges and preferences in a way that reflects realities around competing pressures for time and projects. Equally important, vendors will be able to present their expectations and needs from corporate, individual sales, and support perspectives that will help the library community understand how to better manage our needs and the desires of our vendors. Our goal is to encourage conversation and understanding between two different yet entwined communities.