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Do's and Don'ts of Hosting Content and Service Providers at Your Library: A Few Tips for Your Next Meeting

by **Sarah Forzetting** (Ordering and Payments Librarian, Acquisitions Dept., Stanford University Libraries) <sforzett@stanford.edu>

I've been on both sides of the library meeting table. In the not so distant past, I was representing a library service provider — perhaps having just arrived from another time zone, perhaps a bit out of breath because parking was not as simple as it seemed on the map, perhaps with only a vague sense of the history of the account. Or maybe I was settling in comfortably having visited this library many times before. More recently, I've been on the other side of the table hosting library vendors and publishers visiting the Acquisitions Department of **Stanford University Libraries**. I may not have travelled far for the meeting (and thankfully won't have to fill out an expense report!), but I have put in some time to make sure my department and colleagues get the most out of the short time we have face-to-face with the content and service providers that assist us in the acquisition of library materials.

Library-vendor meetings are necessary and valuable, but they can also be time-consuming and sometimes painful regardless of which side of the table you may sit. The reality, more often than not, is that the vendor representative asked for the meeting and the librarian doesn't necessarily feel like the host. But the representative will certainly feel like a guest in your library — especially when they try to access your campus Internet — and, depending on what kind of business is being conducted, preparing for a visit as if you are preparing for an out-of-town guest can smooth the way for a productive meeting.

Advice for managing relationships between libraries and vendors often discuss negotiating contracts or licenses,¹ how to handle difficult situations,² or describe specific roles or personality types that can have a positive or negative influence on the relationship.³ Drawing on some of my own experience and observations, what I offer here are some practical do's and don'ts for hosting vendor or publisher representatives at your library.

Before the Meeting

If there will be multiple meetings at your library, do delegate one person to be the main point of contact for the visitor. The library contact can coordinate meeting times, schedule conference rooms, make introductions, guide the representative through the maze that so often is the library, and generally play host. These administrative and social tasks go a long way in making a representative want

to take extra time to understand your library, and more importantly, work on your account. Don't make it hard on the visitor by making them contact multiple people or ask a lot of logistical questions — saving them time up front will likely save you time in the end. Do provide parking instructions, offer tips for navigating the campus, and designate a meeting point for the start of the day. In the course of planning, don't forget to leave time for meals, restroom breaks and possibly even a short tour of the library or campus. Some cushioning in the schedule gives both parties time to learn more about one another and establish some common ground.

Do ask your group for an agenda prior to the visit and share the agenda with your visitors. Don't assume that everyone in your group knows what the meeting is about and what their role should be. If you are leading the meeting, do make sure everyone in the room understands why they are there and the goal of the meeting. Having a uniform message from the library during the meeting will help the representative formulate key action items for follow up.

During the Meeting

Don't assume that the rep knows all the history of your account. So do provide context for the points you are making. Maybe there was a key organizational change that impacted the way your business with that company developed, maybe budget cuts have influenced your approach to acquisitions models, or maybe you are now collecting in new subject areas. All of this can provide a useful framework for the representatives as they think about how their company can meet your library's unique needs.

If you are providing feedback about content or services, do provide specific examples of the problem. State the frequency of the occurrence, provide screenshots or photographs of the specific issue, and of course, do provide the necessary context from your institution to further explain why you are requesting a solution. Having specific examples coupled with an explanation of the problem's impact on the library's workflow — and therefore the library's ability to do more or less business with the company in question — will help the representative align the library's needs with the company's

business needs. Don't wait until the last ten minutes of the meeting to bring up a major issue that might lead to a difficult conversation.

Do give the representative an alert prior to the meeting and bring it up as an agenda item. That gives both groups a bit of time to prepare examples, consult with stakeholders that may not be present at the meeting, and think about possible solutions.

Last, but certainly not least, don't let your group air the library's dirty laundry during the meeting. This is not the time for revelations about internal library politics. Similarly, don't allow internal disagreements to derail the meeting. While your visitor may be amused at the infighting happening during a meeting, it also sends the message that your library doesn't know what it wants or needs and will undermine any previous requests you've made.

After the Meeting

Don't expect immediate follow-up from your visitors. They've likely visited multiple libraries during the week of your visit and have a to-do list a mile long. But do persist and escalate if issues remain unresolved. Do continue to send concrete examples and provide business reasons for the changes you are requesting. If the meeting was a sales call to ask for more business and the library has decided not to commit, don't be afraid to go ahead and say so. Offering a decision, even if it might change down the road, will save everyone a bit of time.

At **Stanford**, we know we demand a lot from our service providers. We do our best to make doing business a pleasant experience for all involved; realizing, of course, we don't accomplish this goal all of the time. When it comes to visits from our content and service providers, playing host may only be a small part of our business experience, but the little things that go into preparing for a visit can go a long way in solidifying a long-term relationship. 🌱



Author Bio

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Endnotes

1. **Janet L. Flowers**, Specific Tips for Negotiations with Library Materials Vendors Depending Upon Acquisitions Method, *Library Collections, Acquisitions, and Technical Services* 28, no. 4 (2004): 433-448.
2. **Katy Ginanni, Anne E. McKee, Jenni Wilson, and Linda A. Brown**, "Yer Doin' it Wrong: How NOT to Interact with Vendors, Publishers, or Librarians," *The Serials Librarian* 68, no. 1-4 (2015): 255-261.
3. **James H. Walther**, "Assessing Library Vendor Relations: A Focus on Evaluation and Communication," *The Bottom Line* 11, no. 4 (1998): 149-157.