

2015

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Recommended Citation

Marien, Stacey and Nardini, Bob (2015) "Pushing the Vendor to Improve Customer Service," *Against the Grain*: Vol. 27: Iss. 6, Article 11.

DOI: <https://doi.org/10.7771/2380-176X.7224>

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Pushing the Vendor to Improve Customer Service

by **Stacey Marien** (Acquisitions Librarian, American University) <smarien@american.edu>

and **Bob Nardini** (Vice President, Library Services, ProQuest) <Bob.Nardini@proquest.com>

Stacey's Story

American University is a private, co-educational institution in Washington D.C. with an FTE of approximately 11,000 students. It is known for its programs in international service, public policy and public affairs, and international law and human rights. **AU** belongs to the Washington Research Library Consortium (WRLC) that is made up of **The American University, The Catholic University of America, Gallaudet University, George Mason University, The George Washington University, Georgetown, Howard University, Marymount University, and The University of the District of Columbia.**

In 2010, **Blackwell's** assets and debts were taken over by **Baker & Taylor** and **YBP**. Our library was a **Blackwell's** customer but instead of automatically rolling over with **YBP**, our collection managers decided to evaluate both the **GOBI** and **OASIS** ordering systems. We were already using **Coutts** as a secondary vendor so our searchers had some familiarity with **OASIS** but our collection managers had never used the system. After evaluating both systems over the spring of 2010, the collection managers chose **Coutts** as our primary book vendor.

This article will talk about the bumpy ride **American University Library** had in switching over to **Coutts** for our print and eBook programs and how during that bumpy ride, a partnership was forged between myself (the Acquisitions Librarian) and my staff at **AU** with the various contacts at **Coutts** and their customer service department.

American University was in the first wave of schools to switch over to **Coutts** from **Blackwell's**. Over the next two years, the library implemented several programs with **Coutts**. The first order of business was to get the approval plan profiles set up with the collection managers. Once those profiles were created, we needed to set up the shelf-ready process for the approval books. After the approval plan was implemented, we set up the shelf-ready firm book ordering. The Patron-driven eBook program through **Mylibrary** came next, and then we set up a patron-driven print program. The implementation of all of these programs involved a tremendous amount of time and oversight on the part of me and my staff. I was new to Acquisitions and vendor relations having spent most of my career as a reference librarian. I did not know what to expect in dealing with a vendor and customer service.

My first experience with **Coutts** customer service was a positive one. I was assigned a particular person to contact in the customer service department and she was always prompt in answering my questions. I came to expect a certain level of service and when that person left the position, that level of service was not maintained with my new contact. I would

email the new contact and my questions were not answered but referred to others and then there was no follow up with me to see if my questions were ever answered. This continued for a time and my frustration built. I liked the way my former rep handled my questions. She would send me back my question along with her answer in red. My frustration bubbled over and thus began my push back for better service.

A couple of years into our relationship, **Coutts** went through internal changes with the closing of their customer service center in Canada and the transfer of that service to Tennessee. It was hard to keep up with who I was supposed to contact with my questions and concerns. It got to the point where I would send a missive in the form of a word document to everyone I knew at **Coutts**: my sales rep, my rep who handled the approval profiles, my sales rep's boss, the head of technical services, and anyone else whose email I happened to have. My sales rep would call me and assure me that my dogged persistence was appreciated but all I wanted was answers to my questions.

Here are examples of the ways I would communicate with my contacts at **Coutts**. I would write up a word document and title it "Ongoing **Coutts** Issues" and add the date. I would document all the old issues that I had not received answers on, the last response I had received from **Coutts** and the status of the question as far as I was concerned. Lots of colors were used to highlight the different levels of information or non-information. This document would go out monthly or when my patience ran out. For example:

Old Issues:

With the new TOC service, there has been a problem with diacritics. This is causing records to not be loaded into our system. What is this status of this problem? They (**Coutts** contact) think it's a problem with old codes being used with **MARC 21**.

We are looking into and will report further at a later date (answer received from **Coutts** when question was first submitted).

As of Sept 22, **Coutts** has not responded to this.

Sept 26: (Technical rep) is in the process of contacting **Bowker** with regards to some **MARC** data that is being imported that creates **MARC** loading issues.

I would then add any new issues that had occurred since my last communication. For example:

New Issues:

eBook funds codes in drop down menu. Over the summer we asked that the fund

codes for eBooks be included in the Order information, Site/Location drop down menu. This still has not happened. We do have a work around method to get the eBook funds into the order but we really need to have it show up in the drop down menu.

Sept. 26: Could you please provide the list of funds and we will add them. (Response from **Coutts** rep)

Oct 6: Our records indicate that these funds have been added. However, when we test it, we can see that they are not available to you. Our **OASIS** feedback team is looking into this, I will follow up as soon as possible.

For the most part, this system worked for me. However, it took a tremendous amount of time on my part to keep up with this. As



I said to my sales rep on numerous occasions, why was it up to me, the customer, to have to constantly follow up with answers and keep track of the status of problems? From my viewpoint, it seemed that there was no one on the customer service side of **Coutts** who would take responsibility to see my problems through to resolution. The customer

service rep would merely pass my questions on to relevant parties but would not follow up to ensure that my questions were actually answered. Often, I did not know who my questions were referred to. At times during the first couple of years with **Coutts**, I might have questions referred to four or five people and then the onus was on me to follow up with those people. It was frustrating and time consuming. On several occasions I would be told, "but no one else has ever complained about that." That was not exactly what I wanted to hear! On the other hand, my sales rep would constantly assure me that he wanted to hear my complaints. While meeting with **Coutts** reps at **ALA** and other conferences, I was always told that they wanted to hear my concerns, that often their customers did not bring issues to their attention and they appreciated my frankness.

Five years later and programs are smooth sailing with **Coutts**. We have implemented pretty much every program that can be implemented with them and I have a very good relationship with everyone I know there — from **Bob Nardini** down to the customer service reps. After being reassured time and again that my input was valued, I have finally come to believe it! Now, if they could only implement Table of Contents for eBooks, I would be happy. I am hoping that their acquisition by **ProQuest** will not cause another bump in

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the road and upset the good customer service I have come to expect.

Bob's Story

Every unhappy customer is unhappy in her own way. **Tolstoy** himself couldn't have done a better job of showing how that is true than our partner and friend **Stacey Marien** has done. And in the early period she describes, **Coutts** gave **Stacey** and her **American University** colleagues plenty of ways in which to be unhappy. The famous **Tolstoy** quotation comes from *Anna Karenina*. Fortunately for us all, and unlike the novel, our story had a painful start yet ended well.

In fact, though, **Stacey** concludes with one last "if they could only" statement, and so the story hasn't really ended at all. The scariest kind of customer, in a business where so many details can go wrong, and where all of us can see so many ways to improve how libraries acquire their books, are the "happy" customers you never hear from. For one thing, they are not helping you to improve. You might get the idea you're doing pretty well. Never a good idea, in this business, to get too satisfied. For another, that customer might be doing all her talking to your competition, and not to you.

We're glad **Stacey** talked to us in 2010. A better **Tolstoy** reference for the book vendor world at the time would have been *War and Peace*. **Blackwell** customers had to move, one way or another, there was upheaval in all directions, and corporate change was only a part of it. 2010 was also a year when eBooks reached a certain tipping point and vendors had to get down to serious work to support integration with print books.

American was among the first of our customers to use the OASIS "Review Shelf" for online selection of print and eBooks. We'd worked hard to be the first vendor to offer that service to academic libraries. Among the **Blackwell** customers who joined **Coutts**, **American** was the first to set up shelf-ready service for the print books they bought. So beyond the basics involved in setting up a new account, which can be complex enough, such as getting the invoices right, and the shipping details, and the customer service communications, there was an extra layer or two of complexity.

Rumors
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last night, I was talking to my husband about **Barnes & Noble** and how I liked it. "I hate it," he said, "everything is jumbled together with coffee and snacks and toys and all kinds of magazines and comic books. It's not a serious bookstore." "Yes," I agreed, "but you can go in and see people reading and don't have to be in front of the computer to find things." **Back Talk** this month by **Jim O'Donnell** (p.78)

against the grain
people profile

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Stacey Marien

PROFESSIONAL CAREER AND BACKGROUND: I've worked at **American University** for 16 years. I started as the Business Librarian and then moved to Technical Services and became the Acquisitions Librarian five years ago. Prior to that I was the Business Librarian at **Elon College** (now University) for three years. I received my MLS from **UNC Chapel Hill**, MBA from **UMASS Boston** and a BA in Humanistic Studies from **McGill University**.

IN MY SPARE TIME: I garden, cook, read mysteries, volunteer at the local pet store and for a group that helps people age in place.

FAVORITE BOOKS: I'm a big mystery fan. Right now my favorite authors are **Christopher Fowler**, **Jussi Adler-Olssen**, **Martin Walker**, **ML Longworth**, and **Louise Penny**.

MOST MEMORABLE CAREER ACHIEVEMENT: Having a column (*Let's Get Technical*) in *ATG*, of course!

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I cannot predict the future! 🐼

Did everything go smoothly? Just re-read **Stacey's** contribution for the answer. Did things go terribly wrong? Read **Stacey** for that answer too. Where my **Tolstoy** referencing goes off the tracks is with the first part of that famous *Anna Karenina* quotation, that all happy customers are alike. They are not. Today, I count 28 active OASIS users at **American University**. These **AU** users have been trained to use a customized interface to support a particular workflow involving selections, record downloads, and EDI orders for print books as well as eBooks. Many of these transactions result from the outputs of the profiles we have established with **AU** selectors in 30 different subject areas. Some of these profiles prefer print books, some prefer eBooks. Some have variants in support of eBook and print book DDA programs. Some profiles support approval plans, others don't. We maintain some 300 active **AU** standing orders for series titles and annuals, blocking these against each of the profiles. We record **AU** purchases under about 140 different funds.

This amounts to a substantial sum of money each year. We are glad to have that business, of course. And we are equally glad to have a librarian like **Stacey** as our principal contact at **American University**. "Stacey puts the

facts on the table," as one of my colleagues says. **Stacey** was not only organized, direct, persistent, and patient in her criticisms and suggestions, but she also offered all of this in a spirit, as she says, of partnership.

The business of academic bookselling is always, it seems, in transition. In that year of **Blackwell** and eBook transitions, establishing a new account resembled R & D work. Later, **Ingram** moved the **Coutts** operation from Niagara Falls, Ontario to La Vergne, Tennessee and Fort Wayne, Indiana. That transition, as **Stacey** relates, was not always, as we vendors like to say, "seamless." We are now a **ProQuest** company. Our principal competitor in North America, who is also our partner in the business of selling eBooks, has a new parent company too. Publishers, always our suppliers, now are both partners and competitors as well. We are all busy reinventing ourselves, competing and collaborating with one another at the same time, while preparing for whatever comes next.

It's not easy work. We need the help of librarians like **Stacey**, whose example shows that your best customer, despite what you'd like to think, might be an unhappy customer. 🐼

brought back memories of the now defunct **Intimate Bookshop** in Chapel Hill, NC back when I was an undergrad. Bookstores are wonderful, aren't they?

http://money.cnn.com/2015/12/04/investing/barnes-and-noble-sales-nook-amazon/?utm_source=nl&utm_campaign=dbw-smo-nl-151207&utm_content=804451_DBW+Daily+-+120715+-+no+sponsor&utm_medium=email

<http://franklinstreetstories.com/stories/intimatebookshop.html>

I didn't spend much time with her in Charleston. My bad! **Regina Gong** — isn't she doing a fabulous job of book reviews for us librarians? As a technical services librarian, I am especially interested in **Mary Beth Weber's** book on *Rethinking Technical Services* (see p.35). And aren't you enjoying **Stacey Marien** and **Alayne Mundt's** regular column, *Let's Get Technical*, see this issue, p.57.

Talk about "rethinking," don't miss our **Biz of Acq** column in this issue, p.70. It's about

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