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# Both Sides Now: Vendors and Librarians--Proper Planning Prevents Poor Performance--The "5 P's"

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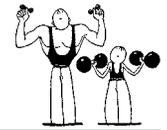
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# Both Sides Now: Vendors and Librarians — Proper Planning Prevents Poor Performance – The “5P’s”



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When we were kids, our elementary school teachers told us that we would be taught the “3R’s – Reading, ‘Riting’ and ‘Rithmetic.” What they were really telling us in that grammatically incorrect manner was that the school was preparing us for our inevitable educational journey through our lifetime. We needed to know the basics of education now in order to succeed in the future.

As we progressed through middle school, high school and then on to more advanced studies, we realized how important a good foundation was to our subsequent education. You can’t build a house starting with the second floor. You need a good foundation so that the first, second and other floors don’t come crashing down due to a weak foundation. Don’t want the penthouse to wind up in the basement.

When understanding how a successful business meeting needs to be prepared for and ultimately conducted by both sides of the table, the “5P’s” become the operative acronym.

## Setting the Stage

To ensure a successful meeting that results in the buying and selling of a product or service, both the information professional and the salesperson need to accomplish certain tasks well before any substantive meetings occur. The first thing that the information professional needs to be aware of is that most companies in our industry devote a considerable amount of time and financial resources to train their salespeople and executives on the fine art of negotiation. The combination of a salesperson’s inherent gregarious nature coupled with knowing the latest negotiation techniques makes that sales rep a formidable presence at any bargaining table. Add to this the fact that salespeople know full well that there are few if any courses taught in Library School on the topic of successful negotiating skills, one would imagine that the deck is stacked in favor of the vendor over the information professional. Surprisingly, the party with most power and leverage is actually the buyer who works within the library market. The power is there for the taking; the question is how to do it. It all begins with planning for the meeting.

A meeting with the vendor should be the result of careful planning by both sides. It would be most unusual to think that the salesperson would be unprepared for a substantive meeting. Monthly financial goals are the very framework by which the rep is compensated. And in case the salesperson is not paying attention to those financial goals, their sales managers, VPs of sales and every other executive who gets measured by profit and loss is definitely watching. The rep has no choice, but to pay careful attention to the negotiation.

So what is the librarian’s responsibility in countering all this preparation and knowledge residing from the other side of the table? Much like the “3R’s” that were drilled into our heads as young students that when practiced prepared us for our future educational exploits, the information professional must practice the “3C’s” so as to be ready to interact with the sales team assigned to attempt to sell the latest and greatest to the library.

1. **Be Concise** — Know what you want. “I am looking for a database that will provide me with import and export data from Asia to the United States within the time period from 1950-1980. I have a budget of \$25K to spend for this resource. This is for a limited three year project so for the subsequent two years, I can only absorb a yearly 2% renewal price increase. The data contained must be verifiable and after the three year term, I will own the data.” Your objectives need to be filled out as part of a document that can be referred to as the negotiations continue.

2. **Be Clear** — The information professional must not only relate their needs to the salesperson, but make sure that those needs are clearly understood by the salesperson. Too many times, sales meetings are held and at the conclusion neither party really understands what the other one was trying to accomplish.

“Bill, have I made it clear to you what it is we are looking for from your company? Let’s go over it again just to make sure that we’re both on the same page. Do you think that your company can fulfill both our informational and financial requirements?” The best way to get to this clarity is to review the mutual “To Do” lists at the conclusion of the meeting. Those lists should include outstanding items that need to be clarified along with the expected dates of completion.

3. **Be Current** — Library folks know all too well that the technology in our industry is in a constantly changing environment. New technologies are being brought to the forefront every day. Current technologies become obsolete in a short period of time. Moreover, your library administration expects the staff to be conversant and understanding of all the new technologies. Make sure that you are well versed in the various aspects of the product under discussion. No need to be an expert, but act as though you are. It’s all in the preparation.

So, now that the stage is set, can the meeting begin? Not really. Before any substantive meeting is held, both parties must agree to an agenda. (*Against the Grain* v.27#4, Sept. 2015 “It’s In Everyone’s Best Interest to Require an Agenda to Make an Important Meeting with a Vendor More Productive”)

Prior to every meeting of importance, the salesperson must supply an agenda to the customer. Date and time are important, but more than that, “what are we going to discuss and who will be the participants of that discussion?” Perhaps it’s a meeting about a new product offering from the company. Maybe it’s a technology upgrade question or an explanation of why the vendor has fallen short of expectations on a recently purchased product. Whatever the topic, each party needs to be in sync as to the reason for the meeting.

Not only does the topic(s) under discussion need to be spelled out in advance, but also who else besides the info pro and sales rep is expected to attend. If the salesperson is informed that the Department Head or Library Director intends to attend the meeting, then it would be wise to have the Sales Manger or VP of Sales there too. That’s because people of similar stature within their respective organizations can make decisions and solve problems quickly. When the VP of Sales and the Library Director come to an agreement, both sides come out with a “win.” Therefore, the meeting agenda:

- Describes the topics to be discussed and eliminates those topics that either side does not to be discussed
- Keeps everyone focused
- Clear definition of goals & objectives of both parties
- Identifies participants
- Makes it a credible meeting
- No surprises

An agenda reviewed by both the Info Pro AND the Sales Rep before important meeting sows the seeds of a successful outcome. It doesn’t matter which side initiates the approval of the agenda. Just as long an agenda of what’s to be discussed has been circulated amongst the parties and approved by all, and then the meetings can begin in earnest. It’s all in the preparation.

The goals of the meetings themselves begin to take shape depending upon how realistic everyone’s objectives really are. That’s when the “goals and objectives” part becomes the most important aspect of the process. The objectives document is a “living document” that will change as the process continues. So many times, an issue that prior to the first meeting was thought to be of importance simply fades away into other issues that gain more importance as time goes on. The objectives document should be in a constant state of being rewritten so as to reflect the changing nature of the negotiations.

By carefully preparing for the upcoming meeting, both sides have the impetus to get things done. Both sides want meetings that make sense; not senseless meetings.

We live in age of acronyms. In trying to link a song to the 5P’s, 3R’s, 3C’s, etc., I could only think of one which is “ABC” recorded by the **Jackson 5** in 1970 written by **Berry Gordy, Freddie Perren, Alphonzo Mizell and Deke Richards**.

“A B C, It’s easy as, 1 2 3  
as simple as, do re mi  
A B C, 1 2 3  
Baby, you and me ...”

The bottom line is that like the song says, “It’s easy as 1,2,3” so long as both parties plan properly, keep their objectives in mind and realize that adjusting those goals as the process continues shows that everyone is on the right track and that the course of action is probably correct. 🍌

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