

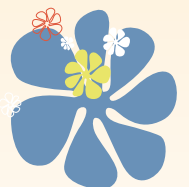


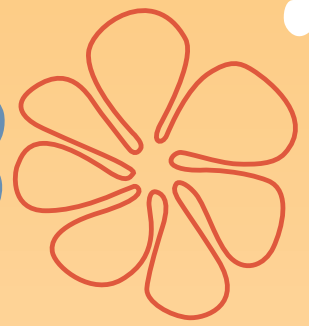
Happy Together

**How to foster mutually-beneficial
librarian-vendor partnerships**

by Devin GawneMark and Sarah Nichols

Relationships take work—especially business relationships. The rapport between librarian and vendor is too essential to be allowed to develop without active management, and the first step in guiding those relationships is identifying the motivating factors that bring you together professionally. Too often the librarian-vendor relationship is depicted in adversarial terms, which at very least fails to take into account your common goals and usually undermines most of your separate objectives in the process.





Librarians and vendors both benefit from productive long-term relationships, sincere reciprocal understanding, and satisfied librarians. And because each interaction influences the level of respect, accountability, and cooperation that you share, an awareness of your individual and mutual goals will make you more successful at fostering lasting, beneficial partnerships.

Advantages for Librarians

There are myriad choices available to librarians, both in terms of research content and infrastructure-supporting applications. In order to keep your departmental strategy on track and minimize time spent analyzing products that are ultimately similar, it makes sense to think about client-to-vendor interaction as a true, long-term business partnership rather than as a short-term transactional relationship. The advantages you can enjoy under the canopy of a partnership with history, collaboration, and shared goals are many and include the following.

Administrative and Operational Efficiency—A multi-year arrangement supports accurate budgeting, ensures predictable and capped expenses, and eliminates untold hours spent on annual contract negotiations. Often, language can be built into a multi-year contract so as to guarantee access to new products or functionality that is developed during the life of the agreement. This protects against unpredictable price increases, while ensuring that the full vendor portfolio is available to a client who has committed to an ongoing relationship.

Influence—Existing clients are often relied upon for advice regarding pricing, products, or functionality enhancements, and, because you have credibility with the vendor, your recommendations are usually taken seriously and acted upon. Most vendors do not undertake product development in a vacuum, and they do rely upon their trusted users for advice regarding optimization. It can be

extremely rewarding as a client to know that it is possible to have this kind of impact. Also, if you can influence the strategy of an entrant new to your sector, that can be very exciting.

Special Treatment—In addition to the above strategic influence, long-term business partners will often get preferred pricing on the core platform, content, or software, as well as access to custom consulting or projects for very favorable terms. A vendor will often undertake a special project, such as database development, complicated content integration, or even the rush set up of 500 newsfeeds, as part of the overarching relationship, and this is often incredibly valuable.

Access to Inside Information—While librarians clearly benefit from a very robust peer network, it is also extremely valuable to tap into vendor knowledge, and this is obviously easier if you are a preferred client. With a trusted business partner, not only will the vendor share (albeit judiciously) information about its own organization's downstream pricing, product enhancements, and overall strategy, the vendor will also often offer sanitized benchmarking data from the client's peer firms. This information covers a variety of areas, such as staff-to-attorney ratios, types of roles within the library organization, general policy information on client recoveries, and other areas.

Visibility—There are many things that motivate a person to perform at a high level within a chosen field, in a particular role, and inside a specific organization. Being perceived as someone who is innovative, effective, strategic, and a strong and inspiring leader is often critical to professional satisfaction. Vendors can often assist with visibility, building on the above dimensions, setting up clients for success within their firms or departments, and as members of a professional network.

Clearly, positioning a librarian to be seen as operationally effective builds

great credibility within the client firm. Partnering on innovative projects and strategies can inspire the entire library staff, with each department member feeling positively about development opportunities and relying upon the creativity and vision of the managing librarian. Vendors also offer speaking opportunities when they sponsor events, as well as ask trusted clients to prepare case studies or product or relationship endorsements that are then circulated widely within the professional network.

The Vendor's Perspective

To make the most of the partnership, it helps to recognize the vendor's incentives for fostering the relationship, both as an individual and as a company representative. From the vendor's perspective, there are three main goals to any client relationship.

Profitable Relationship—Despite everything else, the vendor-client relationship needs to meet the business requirements of the vendor in order to exist. These requirements are based on the maturity of the relationship; for example, the only prerequisite of a relationship with a non-customer is that he or she meets target criteria and is open to the vendor's value proposition. As the relationship develops, though, the business needs of the vendor ultimately migrate towards an expected fiscal return. And while vendor-client relationships should be based on mutual satisfaction and can even blossom into genuine friendships, the financial motivation of a representative's parent company is always present and often supersedes any personal interests should a conflict arise.

Referenceable Client—To look at a broader perspective, law librarians are meaningful to vendors for more than the direct revenue value you represent. For instance, the merit of a significant market share becomes inconsequential if clients are unreferenceable. A vendor's

success with a client, coupled with a well-managed relationship, can develop into indispensable word-of-mouth promotion of the vendor's services. It can also be formalized as marketing and sales collateral for the vendor to publicize the partnership and the service. This can have a return of several new clients for the vendor, which would make the initial relationship profitable even with deep discounts in direct revenue.

Reputation within the Company—

The third vendor motivator is the most often overlooked. Replace the monolithic "vendor" label with "representative," and suddenly the vendor contact becomes an individual, with private incentives that may or may not be in line with the company's. The most universal of these is the desire for professional success, and that is directly related to how effectively he or she can maintain and leverage professional relationships. Factors such as shortened sales cycle, client acquisition, client retention, enthusiastic client feedback, and standing within the industry all contribute to a representative being viewed as successful by his or her peers and superiors within the vendor organization.

An individual account representative may have personal motivations for closing a certain number of deals within a particular period of time to improve his or her professional reputation within the company and in so doing can stretch the bounds that he or she would normally agree to on behalf of those

clients. Meeting a representative's personal business goals can be far less costly than meeting professional ones, can result in better deals for the client organization, and can earn higher esteem from the individual representative to be capitalized on in future transactions.

Librarian-Vendor Interaction

As a librarian you want to be treated fairly by your vendors and business partners. You want to engage in an efficient, respectful dialogue about the commercial terms of the relationship or potential relationship. In order to ensure this, it is important, as the client, to interact with vendors on an equal footing and to make it clear that the value of vendor time and the importance of the sales cycle is appreciated and understood. This helps set the basis for productive, cordial meetings.

Keep Appointments and Be Clear about Deadlines—

It can be easy to look at your calendar for the day, wonder how everything will be achieved, and then cancel a vendor meeting at the last moment. While emergencies do arise, especially in a service profession where the schedules and projects of others often rule, it is important not to take a cavalier approach with a vendor's time. It is equally imperative to let them know about any deadlines you are facing, such as budget input, board meetings, internal project management meetings, and so on. If you have respected the value of your vendor's time, he will do the same for you and will try to meet your requirements.

Be Prepared—Clearly this is not relevant in a "cold call" scenario, but if you do have an interest in a product, or an established relationship that includes business reviews for example, it makes sense to ask for materials in advance of your meetings. Promotional materials, usage reports, available pricing options, and technology requirement specification documents are just some of the types of information you will want to look at in order to best leverage the time you spend on a phone call or in a meeting. In addition to shortening the dialogue during a busy day, the requests you make help the vendor to better understand the points of focus for your organization and what is important to you as an individual.

This will position the vendor to communicate with you only about what matters, as well as to share analogous experiences the vendor has had with other clients.

Communicate Transparently about Constraints—

If you have budgetary constraints, project management challenges, political hurdles to overcome (obviously this last must be handled very carefully if at all, but is sometimes extremely important), or any other predictable issues that might put the brakes on your purchasing, you should discuss these early and clearly. Your vendor will likely need to report back to management on progress, the sales cycle, and so forth. If you put your representative in an informed position, even if the news is negative in the short term, he or she will respect you for it and will appreciate your candor.

Let the Vendor Know if you Need to Manage Upward, and Ask Them for Assistance with Positioning or Promotional Materials—

Rarely do librarians engage in negotiations for any type of product or service without the involvement of other stakeholders in the organization. Frequently, these stakeholders are in roles senior to that of the librarian, and it can be difficult to get their timely attention during contract discussions, product trials, or conversations about technology upgrades, for example. It makes sense to leverage the sales and marketing abilities of your vendors to help structure presentations and strategies that are compelling to your leadership. Often, your business partners will prepare targeted packs that can be shared within your organization and will usually relish the opportunity to present at a practice meeting or to a group of executives. If your relationship is good, they will likely comment to your strengths during such meetings, and this can of course contribute to your positive visibility.

Make Decisions as Soon as Possible—

It is a relatively safe assumption that sales and marketing professionals are comfortable with ambiguity and have experience with

most of the constraints under which you might be working. However, if as a client you can take a definitive decision (whether positive or negative) in a timely fashion and then do the courtesy of communicating it as soon as you can, this will be very much in your favor.

Deal Breakers

It's a great thing to enter into any important relationship with positive intent, and hopefully we can all enjoy many fruitful professional partnerships during our careers. However, there are some scenarios that will simply never work. It's important to recognize that, communicate the news, and move on. Here are some potential deal or relationship breakers from the client standpoint.

The Vendor has an Answer to a Question You Do Not Ask—Sometimes your organization's business strategy does not include a particular product or service, no matter how much you would like it to. If you are approached by a vendor with something that engages your own interest but is clearly not a good fit for your organization in the medium term, don't continue the dialogue.

Lack of Understanding Regarding Your Industry and Your Organization—Just as you should be prepared, so should a vendor who wants to engage you. If you have to repeatedly spend time getting the vendor acclimatized to your professional environment because the representative isn't grasping it, it's probably not going to get any better.

High Turnover Within the Vendor Company—Being assigned a new account manager every six months does not encourage the growth of an effective relationship. It also speaks volumes about the business strategy, culture, and client service orientation of the company, and it may mean your partnership is not a good fit.

Inflexibility When You Are Working with Constraints—A vendor who has more than a transactional orientation will partner with you to overcome financial or other constraints if they occur. If you can't count on at least getting considered attention to needs, such as deferred payments, technology enhancements, the need for specific non-disclosure agreements, or contract language that suits the requirements of your risk management committee, it's best to opt out.

Unprofessional Behavior

In order to achieve the partnership benefits that come from collaborating with vendor organizations, remember to recognize the alienating behaviors that would prevent any sort of relationship from forming. Whether through the accumulation of minor slights or accomplished in one fell error of judgment, you certainly would not intend for your institution to be cut off from a useful resource due to your mismanagement of a business relationship. Examples of such unprofessional conduct include the following.

Vendor as Punching Bag—Law librarianship is not without its aggravations, and the lure of transferring that frustration onto someone outside of your organization who is aspiring to keep you satisfied can be very appealing. But when the vendor's phone number shows up on your caller ID, he or she doesn't know that two of your reference librarians gave notice today. If this isn't the right time for you to discuss rolling those outside-of-contract costs into your standard agreement, don't answer the phone. Courteously done, some consensual venting can actually be a catalyst that brings you closer to a mutual understanding. But if you're actually projecting your job frustrations onto your account representative as a means of catharsis, you'll soon discover that it's the vendor who's dodging your calls.

Vendor as Library Intern—A good account representative is eager to please and occasionally easy to take advantage of. So if his or her company doesn't lay out the invoice the way you would have, why not just get your account representative to type up a custom billing statement for you each month? You're having trouble with your homemade library database, and you know that your representative has SQL experience? Then why bother calling IT if the rep will be stopping in tomorrow? Even fantastic vendor representatives have their limits, and if you're not careful, you will find the point where you're simply no longer worth the bother.

Vendor as Adversary—You never pay list price for anything, and you want to remind the vendor of that often. You signed on at way below cost, and at each contract renewal you shave another percent off the pricing or else you will cancel altogether. In fact, you will only do meetings face to face, you can't be bothered for a referral, and you need the new content a quarter before it's publicly available. You're so good at hardball, actually, that there will never be a return for the vendor, and you negotiate your way entirely out of the relationship.

Parting Thoughts

It's important to remember that vendor goals and client goals are actually quite similar. Both parties are likely to want a longstanding, profitable relationship with stable, predictable terms. As you engage in a commercial partnership, it is important to remember that while you are representing your firm or company, you are also representing yourself. Think about how you would like to be known and described within the extended professional network, and interact with your business partners accordingly. You will then have a consistent "brand identity," hopefully as an honest, flexible, strategic thinker, with whom it is a pleasure to work.

If you decide that a business partnership is never going to be (or is no longer) fruitful, terminate it in the most professional manner possible so as to preserve your integrity and protect both your reputation and that of the other party. The individuals involved in commercial partnerships are likely to meet one another under several differing scenarios throughout the course of a typical career. Carrying forward the attributes and benefits of successful vendor/client interactions, whether from company to company, under the auspices of a networking opportunity, or even during search and recruiting efforts, can only lead to positive results. ■

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information that has been classified without a valid national security justification, and consider the public interest in the disclosure of information.

As President Obama begins his term in office, we are encouraged with what we've seen so far and are very hopeful about the future. We'll continue to monitor developments and keep you updated on the latest news from the new administration and Congress. In the meantime, if you haven't already done so, I encourage you to take a look at this important report, which you'll find online at www.ombwatch.org/21strtkrecs.pdf. ■

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