

Issues in Vendor/Library Relations — The Sales Call

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BN: All of us who sell goods and services to libraries, or who buy them for libraries, like to think that the business we're engaged in is different from other types of businesses. And in some ways we may be right. But in others ways I'm sure we're wrong, since a few universals bind all types of business situations.

We could start with the sales call itself, the encounter upon which everything to follow will hinge--if, that is, anything does follow. Exhilarating, tedious, terrifying, calming, hostile, sociable, vacuous, vital--on both sides of the desk a sales call will be all of these at one time or another. Ritual, ceremony, performance, charade, seminar, skirmish--the sales call will resemble these too.

What makes a good call? I asked **Denise Novak**, who at three different libraries has hosted her share of sales calls, to help answer that question.

DN: Here's a good story about a vendor rep who came to see me when I worked at another institution about ten years ago. This college was small and we didn't have a very large budget. When the rep came to see me, he was always condescending and pretty supercilious. His visits were strictly duty calls. Now move ten years into the future--I'm at **Carnegie Mellon**, which does hold a certain cache. This same rep comes to see me and I know he's trying to make the connection. I have a different last name and there have been a few other cosmetic changes. Finally I took pity on the guy and asked him if he remembered me. He said he thought he knew me so I told him who I used to be and you never saw anybody get so flushed in such a short time.

The moral to this story is never assume you won't see a vendor or a librarian in another position or working for a different company.

BN: I'll bet that rep has been a lot kinder to the acquisitions librarians he's met since. That's one plus for the vendor, anyway, maybe you learn something from a bad call. Sometimes that's the only way, or the best way, to learn your lessons. It's not as if you can enroll in vendor school to learn them.

I remember once, in front of a roomful of librarians at a university that was a major customer of ours, when a bibliographer told me how naive I was to think that they

selected books in a certain way. She was right, I hadn't thought hard enough ahead of time about how this particular library probably operated. One lesson learned, the hard way: librarians care about their work, and blithe vendor assumptions about how they do their work will land you in trouble.

Another lesson might be, from your story, **Denise**, sometimes the best call is no call. If this rep truly thought he was doing you a big favor by talking to you, he'd have done better if he'd just crossed you off his list until you got to **Carnegie Mellon**.

Now that you're there and every rep wants to call, and will exhibit best behavior, what advice do you have?

DN: First of all, make an appointment. There is nothing worse for either the vendor or the librarian than a "cold call." We're all busy people and if you don't make an appointment chances are very good that I won't see you. In fact, if you're not scheduled on my calendar, I won't see you. Please don't put me in that position. Call, send me email, or even a letter--just make sure I know you're coming.

If I know that we have an appointment, it allows me time to gather information for you. Good or bad, feedback is what you want and what I want you to have. Advance notice gives me a chance to talk to my staff about your company's performance. Are orders arriving on time? Were they entered correctly? Are invoices accurate? What kind of service do we receive when we call with a problem? I would also want to know about any problems your company might have with my staff.

Let me know about new services your company is adding, or services that are being dropped. I'd like to know about staff who are new to your company or staff who are leaving with whom my department might have had regular contact.

If you are a new vendor and coming to introduce yourself and your company, you might bring brochures with you that explain what your company's focus is. Make sure you have some references that I can contact. Business cards are important. It gives you your phone number and email address and

fits nicely in my rolodex for future reference.

For both the vendor and the librarian it's important to be pleasant. I consider many vendor reps to be personal friends, so how the meeting goes after business is taken care of is up to those two people. I've also known many of these people for years so there is a bond and a certain comfort level. Lunch and/or dinner with these folk is a treat but I would never presume that feeding me is a requirement of a visit by a vendor rep. Try to end the meeting on a positive note. After all, we're working toward the same goal.

What do you think makes a good call, **Bob**, from the vendor's perspective?

BN: Well, why mince words? For a vendor a good call is one where you come away with some new business, or get yourself closer to new business. No matter how charming or entertaining or professional or whatever you've been in a call, or in a series of calls even more so, if there's nothing to show for it, you didn't do well. (Another story, of course, if the vendor already has the bulk of a library's business; then the call has different aims.)

That may seem self-evident and crass, but I think it can be too easy for everyone to mistake cordiality for a good call. That's not to say that we shouldn't be cordial to one another; but that isn't the reason for a call. It's the rep's business to ask for business. I think the first step toward a good call is for the vendor rep to stay focused on that essential, and for the librarian to respect it.

Closing that equation isn't as simple as it might seem, though. For any rep who's not simply going through the motions, the step of "asking for business" only comes after a series of others, most of them well before the call itself. The rep should have found out as much as possible about the library ahead of time, should have begun emailing and talking with the librarian prior to the call, and should have a good idea before walking into the building what configuration of services would make sense for this particular library. During the call itself the best vendor reps, in this same

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spirit of inquiry, will ask questions and listen at least as much as they talk.

For the librarian, it means remaining open to the possibility that there might be a better way of doing things than the way they're being done. Every rep who's allowed in the door should be given an honest chance to wreak havoc, to blow up the status quo. I say this with all due respect, knowing that for good reason it usually won't happen, and will happen rarely indeed on any first call. But the possibility should be there, and that means that the librarian needs to know the library's status quo inside and out, what's working well, and at what price, what's not working, and why. The librarian also should know as much as possible about the vendor landscape, the rep's firm as well as the competition, and so should be able to ask good questions, including the ones a rep might rather not be asked.

Maybe the librarian agrees to give the rep some business. If the new arrangement turns out to be a lasting one, everyone's ahead, a good call for sure. But even when the rep comes away with no new business, maybe the rep has learned something about the library or about the competition. Or maybe the librarian's comments about the rep's own company can be put to use back at headquarters. Or maybe the rep and librarian hit it off personally, and can help one another in the future. So even when it's not a "good call" for the rep, it's not necessarily a bad call either.

DN: I've always been willing to give a vendor a chance with a trial on a certain number of orders or journal subscriptions. Working with my Acquisitions staff, we'll send the orders and then track them. Sometimes the trial is very successful and we continue to do business with that vendor. But sometimes it turns out to be a real nightmare. But to go back to what you said earlier about the vendor rep staying focused on the essential aspect of getting business, and for the librarian to respect it, you should remember that all libraries are not created equal and that many of us have certain parameters that we have to work within. I'm talking about public institutions and others that have to go out on bid for vendors and those that have no real monies to spend with several different vendors. **Carnegie Mellon** is lucky to be a private institution and we can order materials from just about anyplace we need to.

BN: That's true, of course. Good point, **Denise**, that some libraries will be a long-term project for the rep, and will call for a series of calls. And speaking of nightmares, that's exactly what it is for any conscientious rep, too, when the home office doesn't deliver as promised. Having to go back into the library and make things right, as best you can, is not the kind of call a rep looks forward to. But that's a story in itself, for another time--about when things go wrong. 

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