



Societies and vendors: building effective partnerships beyond the RFP

STM Annual US Conference – Society Day
Positioning your society for high performance

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Background

Why this session?

More than ever before, societies are turning to service providers to help fulfill their missions.

Some business relationships experience just a few bumps in the road, others hit large potholes or even feel like they might even be in a sinkhole.

Even when we approach new partnerships in good faith and plans have been laid, complications are sometimes time-trashing, budget bashing.

Primary objectives: how to better ensure a smooth transition, gaining desired services on time and on budget

Overview

Literature

Case studies

- Online platform
- Publishing partnership
- Peer review system

Q&A

Panelists

Name	Title	Organization
Cara S. Rivera	Managing Partner	KWF Consulting
Elizabeth K. Keyes	Chief Operating Officer	American Pharmacists Association (APhA)
Michael Markey	VP, Project Management	Atypon
Edward Liebow	Executive Director	American Anthropological Association (AAA)
Mike O’Riordan	Editor	Wiley
Ken Kornfield	Director, Editorial, Journals	American Society of Clinical Oncology (ASCO)
Richard Wynne	VP, Sales and Marketing	Aries Systems



A few highlights from the...

Literature

Strategic v transactional vendor relationship

A strategic relationship is the opposite of a transactional one.

The customer still has a significant investment in the vendor and switching poses substantial risks and costs.

But instead of depending on the threat of “exit” to fix the relationship, the vendor is committed to hearing the customer’s voice.

<http://www.cio.com/article/2971717/governance/5-principles-for-great-vendor-relationships.html>

Problem solving orientation

- Invests in learning customer’s business drivers and challenges. Focuses not only on its needs but also understands and respects customer requirements.

Value optimization

- Delivers robust product functionality, excellent service and world-class price. Offering to be competitive on every count.

Purposeful flexibility

- Accepts fair and reasonable terms – even when don’t fit usual sales model. Challenge but essential for strategic relationship.

Risk sharing

- Agrees to terms that ensure risk sharing and accountability, including meaningful financial accountability for concrete results.

Trust

- Willingness to discuss difficult issues and put “elephants” on the table. Without open communication, customer’s voice will not be heard.

Factors to help partnerships succeed

Most buyers forge partnerships with strategic suppliers to cut costs, increase innovation, and improve quality.

Buyer collaboration initiatives work best when they use formal processes, including “catalyst” sessions to drive economic and operational value.

Right approach depends on particulars of relationship.

https://www.bcgperspectives.com/content/articles/sourcing_procurement_supply_chain_management_buyer_supplier_collaboration_roadmap_for_success/

- Sufficient time and resources
 - Organizations often underestimate investment required; more resources deliver more benefit more quickly.
- Stakeholder engagement
 - Involve decision makers from both organizations and get them to support the effort.
- Analytical rigor
 - Supplier collaborations are data heavy; a considerable amount of information must be gathered and analyzed if right decisions are to be made.
- Defined roles and accountabilities.
 - Cross-functional and cross-company nature leverages many types of expertise but also potential source of confusion and bureaucracy.
- Sustainable improvements
 - Momentum after achieving initial success can be difficult; partnerships should be refreshed regularly and initiatives tracked to ensure progress.

Is the RFP obsolete?

You're not hiring a vendor's past, you're hiring their future.

Substitute a streamlined but detailed protocol for a traditional RFP.

<https://www.forbes.com/sites/avidan/2014/02/19/why-the-rfp-is-a-waste-of-time/#6d028aff1a65>

Internal or consultant's knowledge of suppliers to identify short list

Meetings with leadership to understand vendor vision

- Innovation
- Inspiration
- Insight

Workshops with day-to-day teams

- How they work
- Creativity
- Passion

Assignment

- Problem solving
- Proactivity
- Collaboration



Liz Keyes and Mike Markey

American Pharmacists Association and Atypon

Lessons Learned: Platform Implementation

Vendor Experience

Sales Process Expectations

Establish a common vocabulary

- Clarify names of features and functions
- Discuss specific needs to ensure accurate delivery

Establish scope of custom work

- Greater customization = increased effort
- RFP review by tech staff to clarify details

Are you purchasing a platform or a relationship?

- How are challenges and unknowns handled?

Project Implementation

Resourcing

- Establish resource availability for both teams
- Set resourcing expectations during sales process

Scope

- Confirm contractual scope with implementation teams
- Increased platform knowledge = expanded scope
- Gather requirements early

Timeline

- Balance scope, resources, and delivery deadlines.

After the Launch

Customer service

- Determine level of customer services to be provided.

Fix / enhancement velocity

- Determine standard timeline for fixes and platform enhancement.

Set these expectations early on.

Lessons Learned: Platform Implementation

Publisher Experience

Expectations During the Sales Process

Requirements Gathering

- ❑ Needs, gaps, products today, products tomorrow, growth
- ❑ Functionality and interoperability – administration and customers
- ❑ Business processes within the architecture of publishers business systems

Creation of the RFP

- ❑ Think about the “next generation” products
- ❑ Be open to new ways of administering, developing, and syndicating content
- ❑ Staff engagement, bandwidth, expertise

Contracting

- ❑ Get a sample contract...much to discern, learn, and turn!

Project Implementation

Create a partnership! ...honesty, respect, candor, specifics, expectations

Resources – Internal and External

- ❑ Platform vendor is not enough! Form a team of staff, vendor, consultants
- ❑ Focus on workable solution – turning “square pegs into round holes”
- ❑ Match culture and characteristics for success

Iterate (within reason) the project scope

- ❑ Technology solution – can they really do what we need
- ❑ Business solution – pro formas test “reasonableness” and must include “extras”
- ❑ Culture (on both sides) drives workflow, progress, success

Post-Launch Phase

- ❑ Technology solution – how much is enough?...that fine line between perfect fit and disaster 😊
- ❑ Communication – honest and actionable!
- ❑ Customer service – when win/win isn't possible go for reasonable/reasonable
- ❑ Timelines are really the key to any good partnership!
- ❑ There's always one more thing...

Final Thoughts...

- ▣ Accountability
- ▣ Transparency
- ▣ Shifts in business processes and culture
- ▣ New responsibilities, duties, expectations for staff
- ▣ Won't be “perfect” ...strive for better than before
- ▣ Be future focused!



Ed Liebow and Michael O’Riordan

American Anthropological Association and Wiley

Building Effective Partnerships

Ed Liebow, American Anthropological Association
Mike O’Riordan, Wiley-Blackwell

STM Society Day: Positioning Your Society for High Performance
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AAA Extends Partnership with Wiley

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March 9, 2017

Contact Name: Jeff Martin

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AAA Extends Partnership with Wiley

The American Anthropological Association (AAA) has renewed its publishing agreement with Wiley, continuing a decade long partnership.

Wiley will publish the AAA's portfolio of 23 anthropology journals, including *American Anthropologist*, *American Ethnologist*, and *Medical Anthropology Quarterly*. In addition, they will continue to publish, host, and invest in further developments for AnthroSource—the AAA's online portal. Relaunched in 2015, AnthroSource is the premier database of full-text anthropology articles, serving the research and teaching needs of scholars and practitioners in the United States and around the world.



Building on Our Shared Publishing Values

Advance Anthropological Knowledge Worldwide

Accessibility

Breadth

Quality

Sustainability

Clear Communication and Documentation

Request for Proposals

- Society communicates their needs and priorities

Publisher Proposal

- Publisher provides thorough and accurate description of services

Comprehensive and well-developed process for managing transitions

- Wiley Transition Toolkit
- Tracking activities and tasks
- Regular communication between Society and Publisher during transition

The AAA Publishing Program

- Four core values govern our publishing program's management:
 - Quality, Diversity, Accessibility, and Sustainability
- Long publishing history. Began publishing *American Anthropologist* in 1889, 128 years ago this March.
- AAA self-published until 2003, when we simultaneously went digital and entered into a publishing partnership (first with U of California Press, followed in 2008 by an agreement with Wiley-Blackwell).
 - 23 active titles, including *American Anthropologist*, the *Anthropology News*, and 21 titles managed by our sections.
 - 57 issues per year across all major sub-fields – except a title specifically devoted to biological anthropology.
 - Two hosted publications (conference proceedings) in our portfolio whose content is not directly generated by AAA, but made available via AnthroSource, our publishing portal

Publishing Model

- **Member Access.** All content back to Vol. 1 / Iss. 1 of each title (and legacy content of titles no longer active) is available at no extra charge as a member benefit
- **Publishing Partner.** Wiley handles all production, distribution, marketing, and sales to institutional subscribers; in exchange for which they retain a portion of the royalties
- **Portfolio Principle.** The portfolio is a common property resource – royalties that AAA receives are shared with the publishing sections.
 - If the titles were to be treated as individual profit centers, only two consistently generate a net surplus. All the rest are subsidized by the surplus produced by these two.
 - Royalties are allocated to the publishing sections based on a combination of each title's share of the total digital downloads and the gross receipts contributed to the total revenue.
- The Association uses some of the royalty income to subsidize editorial office expenses, which includes salaries for managing editors at the larger journals, and some editorial assistants, travel expenses for some editors-in-chief.
- The Association also has set aside a “strategic innovation fund” to invest in promising pilot programs that may prove to benefit the portfolio and our publishing partner.

Why AAA thinks partnership works

- **Alignment with all of our core values**
- **Never takes relationship for granted**
 - Respects AAA's confederacy model
 - Appreciates our pain points:
 - Open access
 - Tech innovation and user experience research rather than out-of-box solutions
 - Customized editorial office support



Ken Kornfield and Richard Wynne

American Society of Clinical Oncology and Aries



Online submission, peer review and production tracking
system deployment and migration

Good faith misunderstandings – case study



“Yes”

“Do you integrate with Aries?”



“Do you integrate with Sheridan?”

“Yes”



General comments about RFP process

- Get to know vendors *before* the RFP process
- Describe problems and objectives rather than features
- When “no” is the right answer from a vendor
- Communications during RFP process
- When the RFP is over

General Comments about the RFP Process

- What is your timeline?
- Are you going to conduct the process in-house or hire a consultant?
- How detailed should you be?
- Are all parties using the same terminology, definitions, and standards?
- How important is documentation and signoff during the RFP process?

Moderator questions of Aries-ASCO

- How should societies and vendors get to know one another before the RFP process? Who? Topics? When?
- What is the best way for societies to learn enough about a vendor's core features and functionality while ensuring that their more complex needs are met?
- In this case—as in others where two technologies have to talk to each other—would it have helped to have Sheridan and Aries speak? If so, at what stage of the RFP process?
- Is the RFP process too condensed or focused on the wrong things? What is the right sequence and timeline of events?



Audience questions for panelists

Q&A



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Thank you!