



Getting started

How unique institutional identifiers can help you understand your customer base, save staff time and protect revenues

Adding institutional identifiers to your customer data, and discovering the structure of how different records are connected within institutions and consortia, saves time, reduces effort and avoids costly miscalculations in pricing new site licenses, acquiring new journals and reporting on renewal / cancellation trends. Identifiers also enable you to bring different data sets together, supporting more targeted communications and more informed strategic decisions. Here are some examples of how publishers have already benefitted from adding identifiers to their customer data.

Background: data proliferation

Most publishers' customer databases will have been set up during the print era, when institutions typically held multiple subscriptions to key journals. The customer name associated with each order would vary depending on where the purchase was initiated – perhaps a department, a subject library, the faculty library or simply the overall institution. The print fulfillment process

did not require records pertaining to a particular institution to be connected in any way, so for simplicity, each of these would usually be set up as a separate customer record within a publisher's system. This proliferation of data was exacerbated by varying translations of overseas customer names, particularly those originating in non-Roman alphabets.

The problem: calculating customer numbers and per-customer value

Multiple records for each customer, and no function or data to connect them, meant that publishers could not calculate precisely the number of customers they had, or how much each of those customers was spending overall. The impact of this was minimal during the days of growing institutional budgets and print orders, but caused problems when the shift to online and, in due course, budget cuts began to trigger cancellations. Lori Carlin, Director, Fulfillment and Marketing at the American Institute of Physics (AIP), recalls the challenges faced by AIP prior to

its adoption of Ringgold in 2004: "We couldn't be sure whether we were losing subscribers, or just seeing consolidation from multiple subscriptions. We had people poring over numbers trying to work it out, because we needed to understand what was a cancellation, what was a renewal, and what was a new subscription, in order to plan our strategy and our resources. Only once we implemented Ringgold were we able to be sure that we weren't losing customers, and to be precise about how many new customers we were winning."

Case study: accurate, complete data to inform pricing decisions

In order to balance the transition of revenues from print orders to online site licenses, publishers need to know which print orders will be replaced by the site license, and what price is currently being paid overall. This information is even more critical when selling to a library consortia where the number of current orders can be in the thousands; understating past spend can have serious consequences for the business. Nick Niemeyer, Site License Manager at Annual Reviews, encountered this problem frequently: "Analyzing our old fulfillment systems to understand what we were selling and to whom could take days of compiling and massaging data. The data had not been standardized in a way that we could have confidence in tracing each customer entity back to a parent institution." Allison Durocher, Licensing Manager for Scholarly Journals at the American Academy of Pediatrics (AAP), agrees: "Our in-house database is set up primarily

for fulfillment, not customer relationship management," she explains. "Subscriptions are listed in different names and at different levels; I had to do a lot of detective work to make sure I had found all the relevant orders. Even researching the holdings of a single institution could take me hours."

AAP began working with Ringgold in 2006. "Ringgold audited our entire customer data set, adding unique identifiers for each institution and clarifying for us which purchasing units could be grouped as a single customer," continues Allison Durocher. "Now when I am asked to quote for a new site license, I can quickly and easily find everything that should be counted within that institution or consortia's subscriptions. What used to take upwards of half a day now takes 15 minutes." For Nick Niemeyer too, the Ringgold identifier has proven "invaluable" since Annual Reviews adopted it in 2006.

Case study: evaluating and implementing journal acquisitions

Oxford University Press (OUP) contracted Ringgold to audit its data in 2002. Senior Library Marketing Manager Colin Meddings describes the value of the reliable customer and subscription reports that Ringgold has enabled: "OUP takes on publication of new journals each year as societies choose to partner with us. Analyzing and managing customer data is a critical aspect of taking over publication of a journal. Incorrect records at the early stages of an acquisition can have an impact on the journal's ongoing success, so it's important that we can have confidence in that data – which is what Ringgold gives us, by ensuring we can understand the structure of a journal's current subscriptions and compare that in a meaningful way to our existing customer base." Accurate, complete data that can be readily integrated into

a new system is also vital for ensuring continuity of service for customers during a transfer. "Exchanging journals with another Ringgold publisher is much smoother," says Jane Makoff, Associate Director, Marketing at SAGE Publications. "The Ringgold identifier is a common field between our subscription system and that of the transferring journal publisher. It means we can load subscription records much more easily. Where the transferring publisher does not use Ringgold IDs, there is always a risk of institutions not matching and subscription rights not being set up correctly; the whole transfer process is much more manual. If everyone's data had Ringgold IDs, then transitions would be easier and there would be fewer cases of subscriptions getting 'lost' during the transfer."

Case study: integrating intelligence to improve business strategy

Most publishers will have several separate databases including subscription fulfillment, marketing communications, author submissions, online usage, and more. Many business decisions will require intelligence from more than one system; the prohibitive expense of collating and integrating information from different sources often means that decisions are taken in relative ignorance, resulting in suboptimal strategies.

Applying Ringgold identifiers across multiple datasets enables different sources of intelligence to be integrated, enabling a more sophisticated response. "Last year, Ringgold audited all the institutions on our marketing database," continues Jane Makoff at SAGE Publications, whose fulfillment data was audited first, in 2008. "This meant we could load our institutional subscription data into our marketing database more easily, and so tie our researcher and faculty contact details with their institutional access rights. This enables us to carry out targeted marketing, for example, to encourage

greater usage of big deals and ensure that COUNTER statistics for those deals would encourage renewal."

External data can also be combined with internal data if both sets have Ringgold identifiers. "Our usage data from EBSCOHost comes with a Ringgold ID, so I can mash up that data with my records to inform our usage and marketing campaigns," says AIP's Lori Carlin. "Before, we would never have had the resource to join up our EBSCOHost data with our own systems – Ringgold makes it infinitely easier."

"Ringgold has the potential to answer all the big questions that publishers ask of their data," concludes Nick Niemeyer at Annual Reviews. "For each institution, how many subscriptions do we have? What's the revenue? Do we have contact details for personal subscribers? What's the usage? What aren't they subscribing to? Most of us don't have the resources to answer those questions; with Ringgold, we can."

Don't let the perplexity of your customer data prevent you from making smart business decisions.

Talk to Ringgold today about how the Identify service could help.

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