



## **Rules & Roles Changing For Publishers, Researchers**

*With*

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KENNEALLY: In this conversation, we want to explore how research, discovery, and publishing have responded to shifting roles and responsibilities. To help me do that, we've got two participants in the advisory group today joining me on the stage. We have Casper Grathwohl, who is with the Oxford University Press. Casper, welcome.

GRATHWOHL: Thank you.

KENNEALLY: Casper is president of the dictionaries division as well as director of global business development at Oxford University Press. In his role heading business development, he oversees licensing for OUP's educational, academic, and dictionary properties, managing offices in New York, Oxford, and Hong Kong.

And then immediately to my left is Karen Martin. Karen, welcome.

MARTIN: Thank you.

KENNEALLY: Karen is director of the Thermo Fisher Scientific Information Center. In this role, Karen's responsible for leading the Information Center team in providing relevant, cost-effective information services that support growth, competitiveness, and innovation. She is a researcher by training, at least, and has a Ph.D. in molecular and cellular biology, to which we all tip our hat – that is quite an accomplishment – and over 15 years of experience in a variety of roles in the life science industry.

I've participated in a number of discussions, Karen, with publishers talking about researchers, and it's almost never the case that there's a researcher in the room. So this is really, I think, an opportunity for publishers to meet the people who are their



customers who are using their content and to learn about how you do your jobs. So I suppose one place to start would be to describe the experiences that your staff has in meeting the challenges – the diverse challenges of access to information at Thermo Fisher. So tell us a bit about that.

MARTIN: Yeah. Our life would be easier if everybody wanted the same thing. I'm sure that's true for everyone. In our team, we define research two different ways. We do the document delivery side, so innovation is one of our company's core values. So being able to provide access to scientific literature is crucial not just to R&D scientists. They want those articles because they're wanting to develop that next product and also just to understand what their customers – where the trends are going. Marketing teams want to read the papers because they're looking for key opinion leaders and targets for marketing campaigns. Product managers sort of bridge those two sides. They want the technical as well as the key opinion leaders.

And then we also have research in terms of our business is trying to understand where are the next market opportunities? So getting outside of the scientific literature, where are our gaps? What companies should we be looking at? What are their strategies? What's our competitor down the street doing? What trends are coming? What's after CRISPR? What's the next big thing?

So we're trying to address all of that in a company that works with customers and pharma – so many of our customers are actually here – diagnostics, oil and gas, mining, bio-warfare, defense, detection systems, genetic identity. So we have a lot of different markets. And one of our biggest challenges, apart from being able to find the answers, is being able to get access to the right information in a cost-effective manner so that we can address all these different types of information that our users need.

KENNEALLY: OK. Now, a lot of that is reacting to incoming requests. But some of it's proactive, too, and I was surprised by that. Tell us how that works. How can you anticipate, even before someone does ask for some information?

MARTIN: That's actually a really – it's something we do still struggle with. We're not where we want to be. In my ideal world, our researchers would be on project teams at the division level and being able to see what big challenges are they facing over the next three to six months, so that we can be pushing information to them,



anticipating where they're going. We can't always do that now, because we have too much volume, so we can't manage that.

So we do some very non-sexy, non-technical things, like push out newsletters, have distribution lists. We know based on requests we get in what areas the different people work on, and so as we acquire market research reports, those people just get the new content so that they're getting it in their mailbox and they can see what's new. I think the things that we're doing now are – to me, they're a Band-Aid. They're trying to get us in the right direction. We're not quite where we'd like to be.

KENNEALLY: So it's about knowing your customer?

MARTIN: Yes, very much.

KENNEALLY: Casper, I'm sure you recognize that as a challenge as well. At OUP and for other publishers, there are multiple kinds of customers. So tell us a bit about the challenge there, because as Karen said, there isn't one single request for information. There isn't one single customer either.

GRATHWOHL: No, I agree. What's interesting about what you were just saying is that I think we focus – OUP and a lot of scholarly publishers are focused on that core academic use case. When you've got researchers under a corporate umbrella, we're actually sometimes a step further away from them, where we've got a librarian who we're in contact with. Obviously, we now have access to statistics from use, which that kind of data coming in is invaluable, and we're still learning how to use it. But we've got those relationships with the people who are purchasing.

In the corporate environment, we don't have often relationships directly with you. We go through the CCC. So it's interesting how we're a couple steps removed. Unless we make some efforts towards understanding those use cases that you've got – the demand that you're getting, that push and pull, it's hard to – we don't factor that in enough into our thinking, our product development, our policies, all of this. It's a real challenge to think about the various communities that we try to service. And some more – we just have a more traditional pattern with which to engage with than others.



KENNEALLY: Some of that is being proactive just from the corporate side of things, but also there's technology involved, right? You can begin to do profiling, which sounds like a nasty word in other contexts, but in this case it's to better understand the particular researchers, the kinds of work they are going to, what they are doing with that work.

GRATHWOHL: Yeah. Well, and what's interesting is – they were talking before, when the folks were on the stage, about that idea that we have a personal life, where we're dealing with technology in a way that is moving at the pace of consumer interests and how big tech and others are trying to solve problems and anticipate needs and drive us in different places. And then you take a step back – sometimes five years, sometimes it feels like almost 10 years – when you then toggle to a research experience, where we're just not – and that disconnect between how difficult sometimes it is to – whether it's discovery or delivery of academic material, and then you go and you've got an Amazon experience when you're online, or you're doing something in iTunes. That kind of issue is a real challenge and disconnect for us and, I think, one of the things that – it's interesting, though.

As I was listening to the conversation that was happening before, I thought the idea of innovation – where is innovation happening, and what is a publisher's responsibility around innovation in this space? I think sometimes we feel pressure to be doing things ourselves and to be kind of – it's not bespoke, but it's our own R&D and experimenting. I think that experimenting is really important. But a lot of the time what's happening in the consumer space is that experimentation for us, and our real challenge is then to say how do we take that and apply that to our experience?

It only needs to modify where a research experience is different than a regular user journey on the web. Sometimes you don't need to customize very much. So there's a real drive – well, actually, I no longer remember what the original question was. Now I'm just kind of free-form thinking.

KENNEALLY: You're doing great so far, Casper.

GRATHWOHL: But it makes me think.

KENNEALLY: We cut you off (inaudible).



GRATHWOHL: Sorry. No, but the idea of innovation is one that I've been thinking about today, only because I think that sometimes we're aligned incorrectly or our thinking isn't really around the right kind of innovation that we need to be doing, because other people are doing that innovation for us.

KENNEALLY: It's fascinating. I know, Karen, you want to encourage publishers to be innovative. But before we get to some of the directions you might like to see them pursue, I want to pick up on something that Casper was just talking about, which is the way that our lives outside of the workplace are brought into the workplace today in ways that they weren't before. There really isn't the separation. Certainly the way that happens most is because everyone's carrying a device of some kind around with them wherever they go – in the car, where it shouldn't be, and every place else. How does that impact your work?

MARTIN: Well, I just find the way researchers get information is different. When I was in graduate school, which still feels like just yesterday, but if I say the number of years out loud it always alarms me (laughter) – I'm in that generation that would pick up a journal and read most of the content in that journal. There are still scientists my age that do that. But the younger scientists don't. Attention span is shorter. There's so much information. They're searching for certain types of research. They don't care what journal it's coming from. They want it now, which is always a challenge.

And it's not every scientist I can even put in the same bucket, because as much as we have a number of scientists that want instant access on their mobile device wherever they may be, whatever time of day it may be, which can be hard for us because we're a global company trying to fulfill that – but we also have a certain level that tends to be a higher management level that they want to come to us and say here's my list. I have a trip. I'm finally going to have time to read. Here's my list of titles I want. Please put it into my e-mail box, and I'll read it on the trip. Or they'll be at the airport putting in an urgent request and trying to get things done that way.

So there are still differences, but it is – to me, I see much more of just wanting the right information right when they want it and not having to wait for it or have to open up a computer and go through a lengthy authentication to get to their information.



KENNEALLY: I wanted to ask you about the authentication part, because we heard this morning about the RA21 project and the effort to move beyond IP authentication and to really bring that consumer experience of always availability into the research workplace. It seems to be moving fast relative to what happens typically, but you can't get there fast enough probably, right?

MARTIN: No, because it's – so we have IP authentication as a challenge for us because we're a global company and some of our sites share the same IP. If we have different licenses for different parts of our business, IP just won't work. To further complicate things, IT is not always up front about what the current IP addresses are for us to even provide to our partners in publishing. So we have to use other means, whether it's OpenAthens or different means. That means you're creating a barrier for your end users.

We always think about what's our user experience? When we have to change the behavior of our end users, that takes – adoption takes a lot longer. There's a lot more grumbling. And there's a lot more chance that people are going to go find their articles some other means, whether it's their P-Card or going outside the company. Then we can't see what they need, and then we can't be cost-effective in terms of understanding what kind of volume we're really dealing with, so then we can have the appropriate subscriptions. So you kind of can get into this cycle if you start putting barriers up to your end user. I would love to see an easier authentication process that is more unified so that we don't have some of those challenges.

KENNEALLY: Right. Casper, I see you nodding your head there. I was thinking as I was listening to it, I come from the news world. Scratch a news reporter, you find somebody who's got a problem with their editor. Usually they are going to blame it on someone else. How much responsibility are publishers unfairly burdened with as far as this hitch in getting to the content? Is it a publisher issue solely? You probably don't think so. But how much of it can you solve and how much of it is something that has to be worked out in the collaboration?

GRATHWOHL: Look, the fact that that RA21 initiative is taking place – it is a big problem, and we recognize it, and it's not necessarily a publishers' – well, it's definitely not a publishers' problem alone, but it is a publisher problem. And I think that the exploration around how can we make this easier, this process – it's an imperative at this point. I think that traditionally, publishers have been a little bit



more conservative than they need to be. We protect in a phantom way sometimes some of our fears around this.

But then you've also got – and on another side of this – the more we protect our content in a way that actually isn't a good user experience and create certain barriers, you do see that even the good citizens who want to be paying for things or want to be taking the responsibility – they understand the lifecycle and the value chain of how this works and everyone gets supported and its sustainability – they try. They get frustrated. They go to Sci-Hub. And they don't feel bad at that point. They were willing to go through this process, and they get frustrated. I think that we're seeing this more and more.

We now have access to user information in a lot of our products where we actually can understand – we're better and better at understanding that researcher's user journey. As we do, we start to see much more about where they get frustrated, at what points are difficult, how are they kind of moving? And I think that gives us better tools with which to address this challenge.

But it's a big challenge right now, and I haven't seen any experiments – at least personally – and I haven't gone to the RA21 site, and I'm going to get more information and do that now. Because I haven't seen a lot of successful ways in which I think that that's being – that we're figuring that out yet. But it's really encouraging that people are coming together on various points, whether it's publishers and the researchers and the purchasers who are all saying this is a problem for all of us. Let's see what we can do in order to solve it.

**KENNEALLY:** It's interesting. I've heard it said that when it comes to the attraction of Sci-Hub, for many people, it's the customer experience. They get what they want. I was thinking that publishers never really worried in the past too much about customer experience. It was the content, and that was what was critical – quality content and getting it into the proper setting. But customer experience now – that's a whole new realm for a publisher to be working on.

**GRATHWOHL:** Yeah, and it goes to a question – Tracey mentioned this morning that idea around you should be outsourcing the parts of your – the industry pieces that aren't your core competency. I think that's a big question for publishers, is what is our core competency in this paradigm now? Are we just content providers? If we're not just content providers, what else are we – you know, what are we doing?



And why are we better positioned in this new digital world to do that more than some third party or someone who comes up with an industry solution and the like? It's hard to figure that part out.

In the end, we've been focused on content. As we think about these other aspects, I see the friction it creates in just turning the mindset of our machines, which for so long have been about kind of quality content in a particular model and getting people to, within our institution, just think differently – think about data, think about how you use that. The buzzwords are kind of moving around, but sometimes I don't see the culture embracing some of these ways in which we think about needing to transform. And I'm curious what that's going to mean for where publishers sit in the overall value chain and experience in the future.

KENNEALLY: Well, it is interesting, isn't it? Ixxus published a report for the London Book Fair on digital transformation. It's a fairly lengthy report, but the one bumper sticker I got out of it that's just changed my way of viewing not only what we do at Copyright Clearance Center, but what everybody in this room does, is that digital changes the focus from a product focus – putting out a book or a journal or a newspaper or whatever it may be – to a customer focus. And this is just transformative, really, isn't it? It's really something.

GRATHWOHL: It is. And because customer experience was so opaque for so long, it's a multiphase process to really start to understand what customer focused really means in this new digital paradigm. We're still coming to terms with that. In the meantime, there are digitally born aspects of our industry and startups and different verticals that are starting to come out who don't have that baggage. So it's really interesting to understand how where we sit in the ecosystem and where we should. I think that some of it comes down to constantly asking that question around what is the need? What are the needs that you're solving?

It's discouraging sometimes when I think about the range of needs that are out there and, OK, well, are we positioned to solve that need better than someone else in the market? Some of the new needs that are emerging, the answer is often no, which I think is a challenge for a publishing industry that's trying to find new business models and ways in which to continue to grow and stay healthy.

KENNEALLY: It's a conversation that's only just begun. I have to end it here, though. You can continue it later on. I want to thank Casper Grathwohl who is President of



the Dictionaries Division at Oxford University Press, and Karen Martin, thank you so much, from Thermo Fisher Scientific Information Center. Thank you (applause).