IEEE Client Services Managers: Supporting Technical Careers, Promoting Effective Research, Building Global Institutional Partnerships

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Introduction:

Searching the phrase “Publisher Institutional Support Model” will yield wildly differing results based on how and where one is searching. A search in Google retrieves 50,500,000 results, more than anyone bargains for. GoogleScholar reduces results to 1,820,000. A one by one review of the first five or ten of those “most relevant” articles shows that virtually none of them address more than a sketchy and tangential relationship to this topic. IEEE Xplore offers the ability to limit search results to an exact phrase within either a document’s full-text, or execute a more precise (and generally recommended) retrieval of results found in a document’s metadata. The exact phrase “Publisher Institutional Support Model” in IEEE Xplore, using quotations to match that exact phrase, and searching all metadata fields yields two results, one of which explores “crystallography” (a false positive) and the other, Mohammed Al Harthy’s 2015 Conference Publication “Digital repositories: Critical analytical study”¹ data highly relevant to this topic.

None of this is surprising, because the phrase “Publisher Institutional Support Model” is one this author made it up for the purpose of this article; not exactly a neologism, and certainly not one to try to render as an acronym (PISM?); just a newly coined phrase that describes the IEEE’s Client Services Managerial focus. To a large degree, we’re skiing here on fresh powder.

Fresh powder because not many “publishers” (sometimes referred to in the library acquisitions world perhaps ungracefully as “vendors”) could begin to offer holistic support to the corporate, academic, or governmental institutions they service with the same breadth, geographic range, or variety of services provided. As a fluent Spanish-speaking publishing and information professional for some twenty-five years, I had the good fortune of joining that team in May 2012 as “IEEE Client Services Manager for Latin America;” which due to my Spanish fluency also includes Spain, and owing to my residence in Seattle, encompasses Washington State and British Columbia, Canada.

This paper seeks to detail the range and variety of IEEE Client Services Manager (CSM) professional services. The author invites other publishing professionals—in either the for-profit or non-profit arenas— as well as librarians and other information professionals to also enumerate how support services given to or received by their organization may differ from or parallel those described herein. That is not the focus of this work. My sole purpose is to detail and illustrate IEEE CSM activity, explore the breadth of service provided, and celebrate the value institutions receive.

This paper is intentionally limited in another way. While other online resources are tangentially mentioned in this work, most of the documentation and bibliographic references used herein come from the IEEE Xplore Digital Library. Few other tools, platforms, sources, publishers, consolidators, or search engines were engaged. This intentionality narrow scope allows for a rare deep dive into a single leading, highly cited, peer-reviewed, scientific resource; its content and functionality. Limiting the focus of this work also allows the author to discuss what he knows
best, and not spin-out in the vast world of academic publishing, digital offerings, or librarianship. Finally and perhaps most importantly, this limited scope offers some perspective into the underappreciated multidisciplinary nature of the IEEE Xplore Digital Library, often misconstrued as a resource “created for and used primarily by electrical engineers.” Such is my focus. This is not a text book. It is an article.

I’ve coined the phrase “Publisher Institutional Support Model” aware that it is uniquely suited to IEEE CSM activities. IEEE, through its paid staff and network of some 420,000 members and volunteers, may be the only organization on the planet which manages and supports such a robust and long-standing (since 1872) technology document archive, the IEEE Xplore Digital Library. The IEEE also generates and supports a wide gamut of diverse, complimentary activities: over 1,600 annual conferences worldwide, hundreds of university student branches, an internet-based television network IEEE.TV, working groups that create and maintain the world’s most consulted technical standards including the 802.11™ WLAN standards governing telecommunications and wireless technologies, diverse career, authorship, researcher, librarian, administrator tools, 39 societies and distinct communities (technical, geographic, humanitarian, etc.), the Collabartec™ online networking and community connectivity tool, the IEEE Foundation, educational resources of all kinds. I enumerate these activities not only to illustrate the multi-faceted reach of the world's largest technical professional organization, but also to set the context for the teaching, presentation, and sharing opportunities available to IEEE’s Client Services Managers worldwide. Such is the unique “publisher institutional support model” provided by IEEE’s CSMs.

Fostering Partnerships: The Publisher Institutional Support Model at Work:

The core activity of IEEE CSMs - one also made available by many other publishers- is that of promoting platform awareness, describing print and online offerings, and demonstrating, through both in-person and online events, effective search vs. research strategies. The material CSMs present depends in small part on the CSM her or himself (geography, language fluencies, style, personal interests and specialization, etc.); and in large part on the needs and character of any given audience. CSMs work primary with existing IEEE Xplore subscribing institutions - academic, corporate, and governmental- and without exception, carefully and individually tailor interactions and presentations to the needs of that particular group.

Before beginning a presentation with a user-group, before describing Xplore content and functionality, CSMs always seek to meet with an institution’s librarians and/or platform administrators to review and trouble-shoot a variety of pertinent areas. This meeting can serve multiple purposes. Clearly, it is in everyone’s best interest to confirm that the placement and description of the Xplore Digital Library on the institution’s own platform is presented accurately and strategically. As Xplore is a multidisciplinary resource, it is best not to characterize it wholly in the context of “engineering,” or even less accurately -and sometimes common with larger academic institutions within narrowly defined departments- as pertaining
merely to “Electrical Engineering.” Such placement, while expeditious, can dismiss and exclude Xplore’s intrinsic value -both its “short tale” and “long tale” scope- from a huge swath of researchers and specialists in fields of study throughout the entire spectrum of science and technology with interests which either encapsulate or closely “brush against” those of engineering and electronics: computer and information science, agronomy, medicine and biomedics, geoscience, optics, telecommunications, film, video, and television, traditional and renewable energy generation, storage and transmission, digital design, game development, and more.

Placement (“location, location, location”) and accuracy is a key factor in assuring user discovery when accessing IEEE Xplore through an academic, corporate, or other institution’s platform, webpage, or portal. Just as important is the awareness of the Xplore Digital Library as a resource (i.e. as “a thing”); especially with undergraduates or beginning researchers who may be discovering this digital library for the first time, and who, unknowingly default to Google or similar publicly available search tools. While searching in Google and similar sites does retrieve top-quality IEEE content, dependable results have to be gleaned from millions of other less reliable (or fully unreliable) ones.

As suggested, basic and advanced search strategies and research best-practices are the bread and butter of a CSMs work, and to assure consistency and comprehensiveness, include a specific “scripting” of key, end-user, mission critical (sometimes termed “WOW-factor”) concepts and elements: e.g. which documents a user has permission to download based on one’s institutional subscription preferences (the “What Can I Access” tab), using Boolean operators (AND, OR NOT, NEAR, etc.) for greater precision or recall, “stop words” (unsearchable words with no real meaning such as "the", "a", "an"), the use of an asterisk (*) wildcard for “stemming” (broadening searches to different forms of a given word), quotations to find exact, multi-word phrases (e.g. “geographic positioning system” or “fiber optic”), sorting by the newest, oldest, and most cited articles by papers or patents, filtering by content type, publication year, author name, author affiliation, and publication title, and metadata vs. full-text searching. Through advanced search functions, researchers are shown how and why to conduct “author affiliation” searches, offering a plethora of competitive analysis based on author’s place of work (“What have X Corporation researchers been up to recently?”) or study (“What’s being published this year at Stanford, or at universities in Santiago, Chile?”).

These in-person and online sessions (trainings, presentations, demonstrations) also seek to offer researchers (digital library “users” or “end-users”) time-saving tips; easy to employ but often neglected or underexploited tools that help researchers discover, scan, prioritize, and organize content more effectively. Examples of these tools include Xplore’s “personalization” or “Personal Sign-In” functionality, which allows any platform user to create a no-cost individual account, and by doing so, establish personal platform preferences, view search history (their most recent 50 searches), and create email alerts for either saved searches or particular types of content; e.g. a given journal, conference, or technical standard of interest. CSMs demonstrate the
distinct platform download options available, either PDF downloads (available for all documents) or HTML viewing of full-text materials (currently available for over half of the newest and most downloaded documents). CSMs describe the nuances of traditional vs. open-access (OA) publishing (15,546 OA documents in Xplore as of this writing), author and affiliation disambiguation efforts, ORCID IDs, etc. to assure accurate author retrieval and identification (there are lots of John Smiths out there), curation of both controlled vs. non-controlled keywords (IEEE, INSPEC, and Author keywords), and journal and author metrics (both traditional and “alt metrics”), and more.

Search Alerts as an Invaluable Time-Saving Research Tool:

In the context of this work it would be impossible to fully describe the 60 to 90 minute “IEEE Xplore: Content, Features, & Functionality” demonstrations which members of the CSM team deliver almost daily –online and in-person- to subscribing institutions and their stakeholders. Instead, the author wishes to focus on two examples that are particularly useful and underexploited by the technical research community: search alerts and content alerts.

After creating an Xplore personal account with username and password (IEEE members can the same UN/PW created at the time of member registration, or create new one), researchers can then create “search alerts” so that the newest published documents from well-executed and precise searches (articles published yesterday, for example) arrive automatically into one’s email. The examples below are the results of a search alert created from the author’s advanced search (bike OR bicycle AND “Latin America”):

This is an alert “enabled” over the course of the last few months, and which presents 16 documents published between May 2, 2016 and February 1, 2017; documents non-existent when the search alert was created, and which an end-user would have had to search week after week or month after month to find. These search alerts are ideal for specific interests within a given time frame (project deadline, semester papers, etc.)
Similar to search alerts but less targeted are “content alerts” -sometimes called TOC (Table of Contents) alerts- which by using the same personal account, allows researchers to be alerted via email each time a new journal (or a particular conference or standard) has a newly released issue. Below are content alerts from three months of activity relating to journals of the author’s particular interest appearing between December 16, 2016 and March 1, 2017. As with search alerts, content alerts, once saved, can be enabled or disabled as needed. Content alerts are exceptionally useful when a researcher wants to review the contents of a given publication immediately upon its online release.

Library Discovery Service Configuration Best-Practices: Extending the Publisher-Institutional Support Model to Other Library Service Providers

Together with the work of Marshall Breeding3–4, IEEE Manager, Discovery Service Relations, Julie Zhu and Client Services Manager Jalyn Kelley’s article “Collaborating to Reduce Content Gaps in Discovery: What Publishers, Discovery Service Providers, and Libraries Can Do to Close the Gaps”5 perfectly describes the impact that CSMs have when assessing an institution’s discovery tool configuration. Given the global reach of IEEE’s client subscription base and CSM coverage, CSMs meet person to person with librarians and platform administrators all over the
globe who have incorporated discovery services into their library’s homepage as a one-stop user search option. Citing Zhu and Kelley:

“Given that users find it easy to use Google and Google Scholar, the library community has been implementing Google-like, single-search-box discovery services. Since 2009, the library market has been dominated by four major discovery products: EBSCO Discovery Service (EDS), Ex Libris Primo, Proquest Summon, and OCLC WorldCat Local. More and more academic libraries in North America and Europe are adopting discovery service tools, and the trend is spreading to Asia, Latin America, and Africa, and to some corporate and government libraries as well.5”

As the Zhu/Kelley article’s title suggests, visits to these libraries seek to “close the gaps” through improved discovery service configuration when those tools fall short of providing comprehensive and precise recall of IEEE Xplore’s triad or “three legged stool” of content types: journals, conferences, and standards. By bridging libraries with discovery service provider configuration best-practices, Jalyn Kelley and other members of the CSM team help foster a “win-win” partnership between subscribing IEEE institutions and discovery service providers helping assure proper configuration and maximum efficiency.

IEEE’s Newest Platform, InnovationQPlus: Professional Patent Discovery and Analysis

In collaboration with our institutional partner IP.COM, IEEE’s new patent analytics platform, InnovationQ Plus, offers CSMS a distinct but complimentary publisher-institutional support opportunity. Through the demonstration of this new platform, CSMS are scheduling learning sessions (demonstrations, trainings, presentations) with university Technology Transfer Offices (TTOs), entrepreneurship and business and start-up accelerators, legal and intellectual property specialists, law firms, patent offices, and similar groups and organizations6 which seek to better understand their role in the complex world of patents and the legal protections associated with today’s intellectual property. The two platforms –Xplore and InnovationQ Plus- work hand in hand, but are accessed separately. IEEE Xplore allows any user (authenticated or not) to view and sort those documents most cited in US, European, and world patents, and link directly to a document’s citation in a given patent or patent application in the US Patent and Trade Office (USPTO), the European Patent Office (EPO), or the World Intellectual Property Organization (WIPO). Non-authenticated end-users (those not actively affiliated with a subscribing institution) can view and access document metadata free of charge, but IEEE charges for non-open access document downloads for an end-user’s personal use. InnovationQ Plus, one the other hand, is reserved for authorized members of subscribing institutions. By demonstrating functions of InnovationQ Plus: the platform’s patented semantic or “natural language” search engine and patent mapping functionality; CSMS help intellectual property professionals save time and resources by leveraging a state-of-the-art patent tool effectively and efficiently.

Customer Support in China7:
“The “core” work of IEEE CSMS has already been discussed. I want to focus on my comments on what I do differently in China. As IEEE is the largest technical membership organization in the world, the core value of IEEE is our people: members, authors, and volunteers, who can be found in every sizable city and country, and many smaller ones. Along with my regular CSM activities/services, I want Chinese librarians to see our value as partners. My approach is to seek out synergies with IEEE services and resources and bring added value to libraries in China, whenever possible, embedding those resources and services into the real life and work flow of faculty and students. I offer various topics- Xplore search tips, authorship, career development, patent analytics, etc., and always try to get IEEE members, student branches, sections and society chapters involved, allowing end-users a personal expert perspective.”

“We are dealing with a fast-changing world. It is getting more challenging than ever to keep end users, especially young students, aware of and engaged in library services and activities. For that reason, I try to make it fun. In the past few years, I have been working closely with the Peking University library and Peking University IEEE Student Branch to organize a “Library Escape” game. It is a two-day game which requires participants to look for clues inside the library, solve multiple challenges, “find the key,” and “break out of the library.” Participants don’t just play this game for fun; they also get intimately familiarized with library resources (print and online), library layout, and other services. Every year, over 700 faculty and students participate. One typical response from a participant follows: “This is the most fun library event I’ve ever attended. And we are expecting more fun activities like this.” The librarians also give high praise “This is the most engaging library event we have ever implemented. And we can’t accomplish that without the close collaboration of the IEEE.”

“Finally, allow me to address the power of social media. I have conducted on-site trainings and WebEx trainings for many years, and the number of participants ranges from 1 to 200, mostly around 30-40 attendees per session. As we say, today’s library is a library without walls or boundaries. I want to reach out to end users and engage them 24/7, before, during and after my training session, and the best way to do that is through social media. So I am now conducting CSM trainings on social media channels: WeChat, QQ and the Xiaomuchong APP being among the most popular ones today in China. The turnouts have been incredibly high, ranging from 100-1,000 individuals per session. People are more willing to raise questions and interact with the presenter via text in a familiar, daily-used tool. They can listen to trainings anytime, walking, eating, etc. As CSMS, we always try to innovate, try new things, experiment to maximize the value of IEEE content, engage end-users, and help librarians and other institutional partners as much as we can.” Qing Li’s work recently won the “Innovation Library Marketing Award” in China.

Assessment and Evaluation:

How is an IEEE Client Services Manager’s effectiveness assessed or evaluated? In a single word: usage. IEEE and other publishers leverage and scrutinize a variety of complimentary
platforms (MPS Insight COUNTER compliant reports, Google Analytics and others) to gather institutional (not individual) data monthly to track and assess the frequency and breadth of usage: client visits to the platform, abstract views, article downloads, content type (standards, eBooks, eLearning courses, etc.) details relating to IEEE partner-publishers (Wiley, MIT, Morgan & Claypool) download denials (clicking on documents outside of an institution’s “What Can I Access” permissions), etc. Usage is clearly not the only measure of institutional satisfaction with their collective experience with IEEE or the Xplore Digital Library, but it is the primary one. Nothing makes a CSMs job more rewarding than regular and robust institutional platform usage.

Conclusion:

CSMs tend to be strong generalists in technology, but are specialists in the world of digital publishing, digital library resources, and the discovery and nuanced use of this content as intellectual property; thus the phrase “publisher-institutional support model; one that publishers, librarians, and platform administrators should now be aware of. In is not a slight on the profession to suggest that most (not all) librarians -academic, corporate, or governmental - are more comfortable behind a reference desk than networking with a diverse and hard to identify stakeholder network who might benefit from learning about IEEE, Xplore, or InnovationQ Plus. It takes special skills to bring together undergraduates, graduate students, faculty, deans, and department heads in all the engineering fields, computer, information and other science or science-oriented fields and technologies -medicine, business, geography, ecology, aeronautics, telecommunications- who’s work “brushes against” that of electronics and engineering. With this work the author has detailed and celebrated the work of my IEEE CSM colleagues with hopes of illustrating the value this team offers to the institutions we support, and opening the door to future discussions and explorations.

Bibliography:

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