To outsource or not to outsource?

Tips and tools for the society publisher

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Why I’m here! Our client base

• Professional Societies
• Associations
• Not-for-Profits
• University Presses
• Commercial Publishers

Over 80 years’ experience in publishing services to the scholarly/professional sectors

• ACP (American College of Physicians)
• AGU (American Geophysical Union)
• APS (American Physiological Society)
• AMA (American Medical Association)
• ASCO (American Society of Clinical Oncology)
• British Standards Institution (BSI)
• CHEST American College of Chest Physicians
• Cold Spring Harbor Laboratory Press
• Columbia University Press
• European Respiratory Society
• GSA (Geological Society of America)
• GSW (GeoScienceWorld)
• ICE Publishing
• IMF (International Monetary Fund)
• NPG (Nature Publishing Group)
• NEJM (New England Journal of Medicine)
• NRC Research Press (Canada)
• MediaSphere Publishing Inc
• OECD
• PLoS (Public Library of Science)
• PNAS (National Academy of Sciences)
• Royal Society of Chemistry
• SGM Society of General Microbiologists
• University of Columbia Press
• United Nations Press
• World Bank
What do we mean by ‘society publisher’?

Many societies choose to outsource full publishing arrangements to a commercial publisher, retaining copyright and editorial control.

Other societies choose to retain the publishing activities in house, but may need to outsource elements of the publishing workflow...
A simple model of the evolution of publishing

Print era: 1600s - 1980
- Packaged as books and articles
- Physically distributed
- Access and discovery through libraries

Digital Lib era: 1980 – 2010s
- Packaged as books and articles
- Digitally distributed
- Access and discovery through search engines

Platform-as-a-Service era: 2010s
- Packaged as apps and APIs
- Digitally distributed
- Access and discovery through social networks
Outsourcing isn’t new (few societies have ‘self printed’ for some time, or perhaps even mailed, typeset, edited...)

Technology creates opportunities, but makes the whole publishing process more disparate and subtle to manage
The publishing workflow

- Submission (via Peer review)
- Copy-editing
- Typesetting
- Proof finalisation
- Online First
- Online First
- Styling tools
- Ref validation. DOI look-up
- Online
- PDF enhancement: XMP
- Print
- PubMed/PMC deposits etc

Language polishing (pre-/post-acceptance)
Context: It’s not just technology that’s changing fast

Top 10 countries submitting manuscripts

2003

- United States: 42%
- United Kingdom: 5%
- Japan: 5%
- Germany: 5%
- Italy: 6%
- France: 7%
- Canada: 10%
- China: 10%
- Spain: 10%
- Australia: 10%

2013 Projected

- China: 32%
- United States: 21%
- India: 4%
- Iran, Islamic Republic of: 4%
- United Kingdom: 3%
- Taiwan: 6%
- Turkey: 6%
- Japan: 6%
- Korea, Republic of: 10%
- Brazil: 3%

38% non-native English countries
5% China, 42% USA, 10% UK

63% non-native English countries
32% China, 21% USA, 6% UK

Source: Thomson Reuters
The need for speed

Competition is tough!

Growing impetus to capture the best global content, and publish it quickly – to gain competitive advantage; citation advantage; and meet the needs of authors/readers/society members
The need for speed

How easy is speed to achieve from submission > publication with a fully in-house workflow...
The publishing workflow: how quickly could you get through this solo?!

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Supporting your publishing evolution
... What can’t be outsourced?

• Skills related to the **intellectual remit** of the society and its publications (including, I would argue, peer review assessment and editorial board decision-making)

[NB *that peer review decision-making was missing in my graph...*]

• **Expertise** behind the creation and development of CPD/educational resources and their positioning

• **Relationships**: the unique engagement between a society’s staff, members and community
... What can be outsourced?

- Peer review management
- Ecommerce management
- Editing/language polishing
- Typesetting/design/XML conversion
- Digitisation/format conversion (EPUB, HTML)
- Hosting
- Special tech projects – e.g. apps; XMP/semantic tagging; podcasts
- Subscription/membership services
- Full project management from acceptance to publication
- Marketing/conference planning etc.
These are more than just logos

- Peer review systems
- Styling software
- Online hosting
- Printers
- CrossRef
- PubMed Central

... and many others
What if you could...

• Create **opportunity cost savings** (free up internal time for what you can’t outsource)

• **Know what you don’t know.** Utilise partner expertise and tie-ins with other industry experts/systems/models

• Gain new relationships and perspectives

• Find opportunities for scalability/workflow enhancements without even having to think about them...
What if you could...

• Automate processes and re-purposing of content
• Automate quick pagination and proofing/publication
• Integrate systems and author ‘touchpoints’
• Automate generation of table of contents & index from XML – save time avoiding manual generation
What if you could...

• Enable author proofing via link to PDF from XML, and reminder emails, checking if downloaded

• Utilise PDF XMP – semantic enrichment

• Create XML in multiple DTDs, HTML/HTML5; legacy content

• Facilitate online author corrections (the future happening now)…
The publishing workflow: where XML fits

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Ref validation.

XML

Online
Word>paged file workflow... in minutes (driven by XML)

THE WHOLE PROCESS CAN TAKE AS LITTLE AS A FEW MINUTES
Workflow comparison – what can be achieved

- Workflow is streamlined and condensed.

- A typical fast-track schedule is 4-6 days (2 days to 1XO, 2 days for revisions if required, 2 days to delivery of online deliverables).

- Other journals typically take 23-28 days from initial submission to online release.
XML can be used to drive more design-led publications.
Manuscript transferred directly from peer review system avoids re-keying data.

One way to track status of the manuscript is on the “Production Status Grid” shown here.

- The columns show the various production tasks, and desired completion dates (if required).
- The file inventory link provides access to all the files associated with this manuscript.
Checklist for the potential outsourcer

- Consider what you can/can’t keep in house, but seek advice
- Be really clear about what you want, and when by
- What other systems/tools do you plan to use – they can mesh
- Talk with organisations following a variety of publishing models
- Work with partners you can build long-lasting relationships with, to help ride challenges and ‘grow together’
• Be mindful of offshore cultural considerations

• Two-way process: keep partners up to date with policy or content changes, and also developments in your field

• Consider ‘flexiloan’ options to cover difficult periods/bottlenecks (temporary copy-editing; project-management; graphics work)

• Be mindful of the sensitivities internally for managing change – ‘letting go’ of some control. Easiest approach is to take small steps ...

... and see where they lead
Thank you!