Detour Ahead! Planning for the Expected and Unexpected

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In a brief introduction, moderator Kelly Hadsell kicked off the session. She reminded the attendees that the scholarly publishing field consists of detours, pivoting, and planning for the expected and unexpected, as the session title indicated. Referring to the COVID-19 pandemic, she said, "If we didn't know that already, I think we've all really learned that in the last 14 months or so." The session was divided into 3 topics: publisher transitions, the transition to fully online business practices, and internal succession planning.

First, Melissa Schmidt of the *Journal of Osteopathic Medicine* shared strategies from her 19 y of experience for finding a new publisher or renewing a contract. She emphasized that although this kind of transition can bring expected and unexpected hiccups, it can also be an exciting process. She said, "It can be an opportunity to press the reset button, and if managed properly, it can give you the tools to streamline your workflow, have better tools for management overall, and can give you the opportunity to fix those pain points that might have been plaguing you before." She suggested planning 18 mo in advance of the estimated publisher transition deadline in order to lay the appropriate groundwork.

According to Schmidt, any type of transition is an exercise in 2 primary things: communication clarity and managing expectations. She encouraged attendees to review their own internal processes and preferences when considering a potential partner. What are some changes that might be deal-breakers or especially difficult? She stated, "We all have a natural tendency to assume that others think like we do and work like we do. After all, how different could editorial and production processes be? The answer is: VERY different." She recommended completing a strengths, weaknesses, opportunities, and threats (SWOT) analysis, which does not have to be shared publicly. An ideal publisher should be kept in mind as a request for proposals is being prepared.

Schmidt also provided several tips for evaluating publishing bids. She suggested including a staff member from the editorial team in the selection process as they will help raise questions and concerns from the lens of the editorial process. She also mentioned that the bid from the publisher should include "soup-to-nuts" descriptions of their publication process, as these will likely be the pain points (such as communication style and frequency, marketing, reporting and metrics, etc.) during the transition. Melissa recommends aiming for a publisher that has the least deviation from a company's current process.

Next, Jill Jackson of *Annals of Internal Medicine*, shared her journal's experience of having to shift gears from in-person work to fully online operations as a result of the COVID-19 pandemic. The change to online operations was a challenging transition for Jill's team as her entire staff usually worked at the office. Like many others, Jackson only expected the change to be temporary. Several issues had to be addressed in order to make the shift to online work feasible and as smooth as possible: 1) Each team member needed to be supplied with a laptop/computer. Did everyone have internet? 2) What tasks needed to be completed at the office? 3) Zoom accounts needed to be purchased for the team. 4) The VPN needed to handle all the remote employees.

While company logistics were being sorted, due to the salience of COVID-19 research, the journal experienced a surge in manuscript submissions. Jackson said, "Our submissions were literally doubling with no end in sight. It was challenging for everyone to keep up, including the editorial staff and the senior editors." However, the flexibility to work from home actually allowed staff to work overtime and keep manuscript acceptances at a prepandemic rate.

According to Jackson, the team took additional steps to keep up with the surge. These included fast tracking COVID-19 submissions and reviewer deadlines, adjusting email templates, adding messaging and alerts for authors on their submission systems, notifying authors of delays/slowness during holiday breaks, and utilizing infectious disease specialists on staff to help triage submissions. Annals received some of their journal's largest number of Twitter mentions to date. In addition, the pandemic led to new online onboarding processes such as buddy systems, and the recording of training sessions proved very helpful.

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Finally, Jessica Rucker of ACS Publications discussed methods for streamlining internal succession planning. She said, "[Succession plans] are not just 'nice to have.' Disaster proofing is more important than ever. Our industry moves really fast." She emphasized that there are positive applications to these plans as they can help you identify gaps in skills that you might have related to recruitment. Rucker recommended that employers should determine whether they need to do external recruitment, or if they already have key talent on their team or in an adjacent team. Internal team members should be coached and supported with their career development.

Rucker then proceeded to break down the steps of the succession planning process (Figure). First, a succession planning team needs to make key decisions about the scope and methodology of their efforts. For example, what positions will be involved, who will be included in planning discussions, and how transparent will results be to staff. Second, "HR housekeeping" should be done, including updating role descriptions and aligning them with organization strategies, objectives, and core competencies. Once those materials are in hand, needs for each position should be defined and job profiles should be created so that potential successors can be identified. Rucker recommended ensuring confidentiality and setting up ground rules for discussions around potential internal successors. Finally, once a succession plan has been created, make sure to clearly document plans and commit to revisiting and updating on a regular basis.

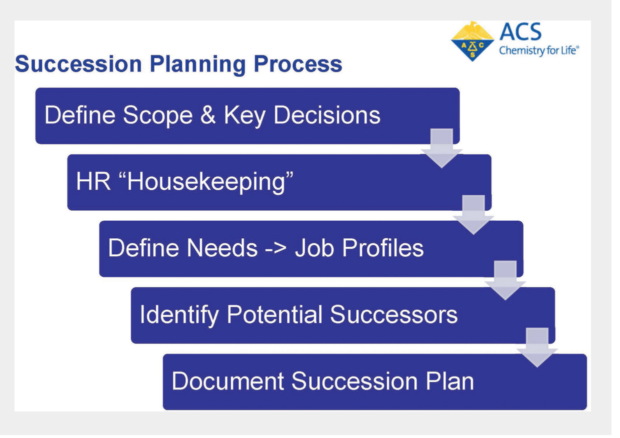

Figure. Succession planning process.

Although the transitions discussed in each presentation were different, they can all be applied to different scenarios for different journals, institutions, etc. The common thread is that change is inevitable, especially during a crisis such as the COVID-19 pandemic. During this session, we were given various helpful tools to adapt to change and learn from these experiences.