

**MARKETING IN EDUCATIONAL PUBLISHING:
A CASE STUDY OF TEXBOOK SALES BETWEEN COMPETING
PUBLISHERS**

by

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ABSTRACT

In March of 1999, the Ministry of Education for the province of Ontario published guidelines mandating curriculum changes for Ontario schools. The document stated that a new, mandatory course in career studies was to be taught to grade ten students. The establishment of the new course created a market for sales of a new textbook for the course. In Canada, in the sphere of educational publishing, Pearson Education Canada Inc. and Nelson Thomson Canada are close competitors. At the time of these curriculum changes, the companies were of equal size and stature in the Canadian educational publishing market. In the creation and production of a textbook for the new course, the companies worked within set parameters. The government of Ontario set the framework for the textbook envisioned for the new course. These curriculum guidelines called for a “special” textbook; a book that dealt with concepts that were non-specific enough to accommodate the different goals, views, and aspirations of each student. The government of Ontario designated an agency (the Ontario Curriculum Clearinghouse) to evaluate any textbook intended for the course. The time constraints set for the approval process and for ordering of textbooks were immutable. The competing companies had staff with expertise in responding to a government’s call for resources and in the preparation, production and marketing of a textbook. The textbooks produced by Pearson Education Canada Inc. and Nelson Thomson Canada were virtually indistinguishable. The approval agency gave similar endorsements to the book produced by each company.

But Nelson Thomson Canada outsold Pearson Canada Inc. by four to one. This paper will argue that the reason for the difference in sales was that Nelson Thomson

Canada was active in the market long in advance of Pearson, and that, all other factors being essentially even, especially in a market that had distinct time limits, this fact resulted in their conquest of the market for sales of a career studies text. Nelson Thomson Canada outsold Pearson Education Inc. by a margin of four to one because it started to market its textbook a full five months before Pearson determined to compete.

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BACKGROUND

Introduction

The purpose of this paper is to compare and contrast two specific products and the marketing strategies and efforts of Pearson Education Canada Inc. (Pearson) and Nelson Thomson Learning (Nelson) with respect to their specific products, textbooks written to meet new curriculum requirements enunciated by the Ontario government for a new careers course. In Canada, Nelson and Pearson are close competitors. The companies are of similar size and stature in the educational market; both have personnel with a broad range of experience in production and sales for the educational market. In the development and the marketing of their textbooks for the new course, the requirements and time limits set by the Ontario Government were imposed on both. The final product of both companies was, arguably, virtually indistinguishable; the books look and feel the same and the review comments made by the agency critiquing the content were essentially similar. But Nelson sold over 40,000 copies of its book, while Pearson sold only 9,320 copies. Nelson outsold Pearson by a ratio of four to one.

This paper will argue that the various factors that effected sales by Pearson of the careers studies textbook were all a factor of time; that in terms of a start-to-finish campaign, Nelson had such a lead that Pearson could not conceivably catch-up. Nelson committed to the project of developing a textbook for the new course at a far earlier date than Pearson. The marketing campaign of Nelson with respect to its careers text began before Pearson had even decided to produce a book for the market. People at Pearson knew how to sell the book, but the lateness with which Pearson entered the market

compromised all marketing efforts. In the matter of sales of its textbook, Careers 10, Pearson was effectively relegated to play catch-up to Nelson. Succinctly, Pearson did not have the time to put all the factors that contribute to a successful marketing campaign into play with respect to its textbook for the career studies course.

Research Methodology

The research for this paper consisted of interviews with people at Pearson and at Nelson. The people interviewed, at both companies, were the individuals directly connected to the development, editing or marketing of the competing text. Interviews of personnel at Pearson were conducted at two different times: Before the actual sales of the book were known and again after final sales figures were available. The questions posed to each person interviewed were the same, each individual was asked to describe and opine on the book produced, the process by which the book was put together, and the marketing efforts. When sales figures were known, some questions were re-addressed to Pearson personnel to determine if opinions had changed or had been revised in the wake of sales results. In the later interview, individuals were also asked if they could identify a factor or factors that, in their opinion, explained or contributed to the final sale numbers. Individuals at Nelson were asked the same questions as those posed to Pearson personnel but the interviews were conducted when final sales figures were known. Follow-up interviews, to request additional information, were conducted while this paper was composed. These later interviews sought specific information to add details to the marketing efforts of Pearson or of Nelson.

Research on the corporate history of the competitors, the government curriculum requirements for the new book, and the process of obtaining government approval was conducted through the Internet using information posted at the web sites of the competitors, the government of Ontario and the Ontario Curriculum Centre. Information on the school boards and the number of secondary students in the district administered by the school board was extracted from the web site of the Ministry of Education.

The research was augmented by my work experiences at Pearson and Nelson. At Pearson, I worked on the marketing of the career studies textbook, and accordingly gained insight into the marketing process as it unfolded. Employment at Nelson provided me with an opportunity to observe the processes that this company follows in the marketing of a textbook. Finally, instruction received at Simon Fraser University in the Master of Publishing Program provided the conceptual framework for the analysis undertaken. Class notes, class discussion and course materials provided theoretical information on marketing strategies pertinent to book.

ONE

The Competitors

Pearson Education Canada

Pearson Education is one of four operational units of Pearson plc, an international media company with headquarters in London, England. Globally, Pearson plc does business in 62 countries and employs over 30,000 people (At a glance, 2001). Its other divisions include The Penguin Group, Pearson Television and the FT Group. The Pearson Education division includes such principal subsidiaries as Addison Wesley Longman, Inc., Addison Wesley Educational Publishers Inc., Macmillan USA Inc., Pearson Education, Prentice Hall Inc., and NCS Pearson (Principal Subsidiaries..., 2000). In the 2000 fiscal year, the Pearson Education division of Pearson plc recorded sales of over £2,044m. In the 2000 Annual Report of Pearson plc, Pearson Education is described as the “world’s leading educational business” (Pearson Education: profile, 2000).

The corporate roots of Pearson plc trace back to a construction company, S. Pearson and Son, formed in Yorkshire, England in 1844. At the turn of the nineteenth century, this construction company decided to diversify its operations and in 1920 entered the publishing and media business through the acquisition of a group of United Kingdom provincial newspapers. In 1968, it solidified its position as a publishing entity through acquisition of the Longman Company. Through this corporation, Pearson plc asserts roots in educational publishing back to 1724—the year the Longman company was formed. Longman published the first book typeset by Benjamin Franklin, *The Religion of Nature Delineated*, in 1725. In 1755, it published Dr. Johnson’s *Dictionary of the English*

Language, in 1852 it published the first edition of *Roget's Thesaurus*, and in 1863 it published the first edition of *Gray's Anatomy*.

The position of Pearson plc as a major educational publisher was further consolidated in 1988 through the acquisition of the Addison Wesley Publishing Company, an American enterprise incorporated in 1942 under the name Addison-Wesley Press that in its first year of business published the seminal text *Mechanics*. In 1950, Addison-Wesley Press published its first book on computer programming, and by 1969, with the "IBM Systems Programming Series", the Addison Wesley Publishing Company, the corporate name adopted by Addison-Wesley Press in 1952, was the dominant publisher in the area of computer programming.

In 1995 Pearson plc merged the operations of the Addison Wesley Publishing Company with Longman Publishing to form Addison-Wesley Longman Publishing. In 1996, through this newly formed company, Pearson plc acquired HarperCollins Education Publishers, the company that owned Scott Foresman & Co., the publisher of the first Dick and Jane readers (History, 2001).

The position of Pearson plc as a global educational publisher was galvanized in May of 1998 with its successful bid of US\$4.6 billion for the educational operations of Simon & Schuster from its parent, Viacom, Inc. (Liu, 1998). In 1984, Simon & Schuster, a company formed in 1924 to publish a book of crossword puzzles, began to expand its operations from consumer publishing into the area of educational publishing. This move, which had been signaled by the purchase of Prentice Hall, continued for the next decade. In the years 1984-1995, Simon & Schuster acquired the following: Ginn & Company and Silver Burdett Company in 1985-1986; Regents Publishing in 1987; Quercus Corp. and

National Publishers in 1988; Ellis Horwood in 1989; Janus Book Publishers, Inc. and Computer Curriculum Corporation in 1990; Macmillan Computer Publishing in 1991; Macmillan Publishing and Educational Management Group in 1994. During the same period, Simon & Schuster purchased a multitude of educational titles and imprints (History, 2001). Regulatory approval by the US Department of Justice for the Pearson plc acquisition from Viacom, Inc. was announced on November 23, 1998 (US regulator clears..., 1998) and the sale transaction completed on November 30, 1998 (Pearson completes Simon & Schuster..., 1998). On the same day, Pearson Education, a division of Pearson plc formed by the merger of Addison Wesley Longman and the educational units of Simon & Schuster, was officially launched (Pearson Education: World's leading..., 1998).

In Canada, the Pearson plc purchase from Viacom, Inc. meant acquisition of Prentice Hall Canada and a subsequent merger with the Canadian arm of Addison Wesley Longman. The complete transaction was subject to review under the strictures of the *Competition Act*. Approval for the transaction was formally announced on August 27, 1999 (The Competition Bureau completes..., 1999), subject to the newly formed Pearson Education Canada Inc. divesting itself of titles in mathematics and French-as-a-second-language to ensure competitiveness in these areas of business was not compromised (Annual Report 1999-2000 – Reviewing mergers, 2000). On a practical, operations level the formation of the Canadian arm of Pearson Education meant amalgamating the personnel of Prentice Hall with that of Addison Wesley Longman and establishing new corporate offices at 26 Prince Andrew Street in the Don Mills sector of Toronto. The move to the new location was completed in November of 1999.

Nelson Thomson Learning

Nelson Thomson Learning is the Canadian division of Thomson Learning, a division of The Thomson Corp. Like Pearson plc, The Thomson Corp. is a global media company employing over 36,000 people in the 140 countries in which it does business. In the 2000 fiscal year, the Thomson Corporation recorded sales of US\$6.514 billion, with sales in the Thomson Learning Division totaling US\$1.389 billion (Annual Report, 2000).

Like Pearson plc, the corporate roots of The Thomson Corporation were not initially in publishing. Roy Thomson, the founder of the business that would become a global media giant, started in the business of selling radios and, in an endeavor to sell more radios in his territory, started a broadcasting station in North Bay, Ontario. He then acquired a license to open a station in Timmins, Ontario and set up offices in the same building as *The Press*, a local weekly newspaper. In 1934, to avoid an altercation with his landlord, the owner of *The Press*, Thomson purchased the newspaper. This purchase proved to be the first of many. In 1943, he purchased four more Ontario-based newspapers. In 1947, he purchased the *Guelph Mercury* and the *Chatham Daily News*. By 1953, the year Roy Thomson acquired his first newspaper in the UK, *The Scotsman*, he owned more Canadian newspapers than any other person or group.

In 1961 Thomson Publication UK was formed with the objective of expanding into the area of business and consumer publishing. The strategy for growth of this entity was the same used in the business of newspaper publishing—growth through acquisition. In 1962, the company purchased Thomas Nelson & Sons, a company that began its operations in 1798 with the establishment of a bookstore in Edinburgh, Scotland. By

1914, the operations of Thomas Nelson & Sons had grown to a size that merited the establishment of a Canadian branch and an office was opened on King Street, in Toronto. During the 1920s and 1930s, this company produced a series of readers for classrooms across Canada. In 1978, the year Thomson Publication UK was restructured and its headquarters moved to Toronto, it acquired Wadsworth, a leading publisher of educational textbooks. In 1980, Thomson International Organization Limited purchased Warren, Gorham & Lamont, a publisher of material for finance professionals. In 1981, it acquired Litton, a publisher of healthcare information. In 1985, it acquired Gale, a provider of materials for schools, libraries and businesses. In 1986, it acquired South-Western Publishing and in 1987 purchased Sweet & Maxwell and the Law Book Company. In 1989 it acquired Lawyers Co-operative Publishing and the Research Institute of America. In 1992, it acquired Micromedex and the Institute for Scientific Information. In 1996 it purchased West Publishing. In 1999, it acquired Macmillian Library Reference USA. In 2000, it acquired Greenhaven Press, Lucent Books, and a score of other companies engaged in the provision of financial, economic or regulatory information (Into the new millennium, 2001).

Like Pearson plc, The Thomson Corporation recently galvanized its position as a leading publisher of educational materials by acquiring, as part of a bid made by Reed Elsevier, a portion of the educational businesses of Harcourt General (The Thomson Corporation to acquire..., 2000).

Today

Currently, both Pearson and Nelson have their Canadian head offices in Toronto. Each corporate entity employs approximately four hundred people at its head office. The

number of sales representatives employed by each company throughout Canada in its school division is 25.

The Corporate Name

Though Pearson and Nelson are close in size, though their histories are similar and though their current Canadian operations are commensurate, at the time of the career studies textbook, Pearson was arguably a new name to educators or school board members in Ontario. The name “Nelson” was common to Canadian educational publishing since 1914, but the name “Pearson” was relatively new, introduced to Canada in August of 1999 with the merger of Prentice Hall and Addison Wesley Longman. Conceivably, the fact that Pearson was a name new to educators and school board members could have influenced the decision as to which text to purchase for the new course. The brand-recognition implicit in the Nelson name could have been advantageous. Any possibility that the corporate name would affect sales was eradicated by the fact that Pearson published the text under the well-known imprint of Prentice Hall. Mark Cobham, at Pearson, discounts name recognition as factor contributing to sales of the textbook, stressing that time was the key: “...we could have been called anything and had we been at them earlier we would have been fine”. (personal interview, September 19, 2000)

TWO

Background to Careers Studies Textbook

It is axiomatic that educational publishing for the K-12 market differs from trade publishing. The market for an educational publisher is not the general reading public but a division of government; a ministry or department of education. The books produced by educational publishers are not in response to the researched or perceived demands of readers but are dictated by educational needs determined by bureaucrats; materials produced are predetermined by governmental education policies expressed in curriculum guidelines. A change in education policy that prompts new curriculum spawns a large and immediate market for textbooks and resources to meet these curriculum changes.

In Ontario, the Harris government, as part of its broad initiative to improve education in the province, a feature of its re-election campaign in 1999, made massive changes to educational policies. Under the heading of “Ontario’s High-Quality Education Plan”, the government proposed a new, more rigorous curriculum for Ontario schools (Business plans..., 1998). This commitment to a new curriculum for Ontario schools created the market for the careers studies textbook. The potential market was large. At the time of the demand for the textbook, for a mandatory, one-semester, grade ten course, Sue Cox, at Pearson, estimated there were 160,000 grade ten students in Ontario (personal interview, July 19, 2000). The course was for a single semester, and arguably some schools would offer it twice in a school year and thereby halve the number of required texts. But even assuming all schools could arrange their timetables and staffing

to offer the course twice in a year, the need for a careers studies textbook created a potential market of 80,000 books.

The demand for the careers studies textbook was initiated in March of 1999, when the Ministry of Education and Training released the document entitled “The Ontario Curriculum, Grades 9 and 10: Guidance and Career Education, 1999”. In this publication, the Ministry set out the expectations and requirements for the new curriculum in the subject area of career studies (Guidance and career ..., 1999). A companion piece, “The Ontario Curriculum Grades 9 to 12: Program Planning and Assessment, 2000”, confirmed the course intended for grade ten would be a mandatory, half-credit course. The Ministry set September 2000 as the date the new compulsory course would be offered in Ontario schools (Program planning ..., 2000).

In the “Guidance and Career Education” document the Ministry listed five categories, called “strands”, of expectations for the new curriculum. Three of these strands were to be covered by the grade ten materials: 1) “Personal Knowledge and Management Skills,” 2) “Exploration of Opportunities,” and 3) “Preparation for Transitions and Change”. The instructional objectives for each of these strands were explained in statements of overall and of specific expectations. These statements constituted a general and then more detailed explanation of what students were expected to learn and the skills they were expected to demonstrate (Guidance and career..., 1999 pp. 9-11).

In addition to detailing the general and then more specific expectations to be met in each strand, the ministry document included additional requirements that were to be

achieved in the teaching of the careers course. The course was to foster the development of a process “for effective learning” that would be used throughout the life of the student:

Helping students become self-directed, lifelong learners is a fundamental aim of the guidance and career curriculum. Teaching must not only convey the knowledge and skills of the subject but also provide students with a process for effective learning that they can use throughout their lives (Guidance and career..., 1999, pp. 3-4).

Though implicit in the detail listed under each strand and in the statement of fostering a process for life-long learning, the ministry document also expressly stated the requirement that the material be student-centered:

In the guidance and career curriculum, students begin by acquiring self-knowledge and exploring the world around them. They learn by doing. They then synthesize what they have learned by reflecting, analyzing, evaluating, making decisions, and setting goals. Finally, they apply their learning both in the classroom and in other contexts and evaluate their progress. Students thus learn how to take responsibility for their own learning in preparation for life beyond secondary school (Guidance and career..., 1999, p. 3)

In addition to the “Guidance and Career Education” document, the Ministry released a “Manual and Style Guide” for secondary school curriculum that was posted by on the OCC web site. This document confirmed that the statement of expectations expressed in the “Guidance and Career” document were to form the content for the new curriculum and re-iterated that the content was to be student-centered:

In an expectation-based curriculum, teachers focus on what students should learn and on varying their methods of teaching, assessing and evaluating to meet individual differences in student abilities, backgrounds and needs. The focus is on the achievement expected of the learner.

The focus of the expectations requires the teacher:

- Assess and evaluate individual student progress continually
- Use appropriate resources and strategies to facilitate and improve each student's learning
- Enable all students to gain a clear understanding of the expectations, what they are required to know and be able to do for each component of a course

(The Ontario secondary..., 2000, p. 1)

The government documentation also set further requirements to be met by materials intended for the career studies course. In the "Guidance and Career Education" document, the ministry mandated that the new course foster development of technology skills and an understanding of the impact the computer has had both socially and economically:

In addition to using a variety of computer applications, such as word-processing, database, and presentation software, students in guidance and career education courses will learn how computers and other emerging technologies (such as the Internet, satellites, and robotics) have transformed the lives of most workers today and have created new jobs, opportunities, and challenges locally and globally (Guidance and career..., 1999, p. 13).

The textbook for career studies was also to be cognizant of literacy issues; to be sensitive to the needs of students for whom English was a second language. The course was to encourage English Literacy Development. The ministry stated the intent in the curriculum guidelines: "guidance and career education curriculum offers important learning opportunities for ESL/ELD (English as a Second Language/English Literacy Development) students" (Guidance and career..., 1999, p. 13).

As the extracts from the ministry documents indicate, the careers studies course called for a type of textbook that was conceptual in nature. A survey text, consistent with a history course would not meet the expressed curriculum requirements. A book with instructional explanations and corresponding problems, a text designed for a math or

science course, would also not fit the bill. There were no set patterns to the information to be contained within the text; rather it required an exploration of broad concepts akin to “lessons in life”. The material was also to exhibit an individual focus; the expectations were to be particular to each student, to each as an individual formulating a career plan. The material was to have a life-long impact; endowing each student with a “process” to decide on a career, prepare for that career and to be able to adjust to economic or social changes that would impact on that career choice.

Susan Cox, at Pearson, provided her assessment of the government requirements:

There are a lot of expectations you have to cover in that particular course. It's also a course that is very student-centered so it's not a lot of information they can memorize or give back to you. A lot of it is around the student and the process they are going through to develop some sort of plan for themselves. You're evaluating the process and not so much the final outcome because you can't say what the student has chosen to do is right or wrong (personal interview, July 19, 2000).

The documents released by the Ontario Ministry of Education mandated a specific type of textbook for the new career studies course and although it was set that the new course, with presumably a new textbook, would be part of the grade ten curriculum in September 2000, it was uncertain whether or not government funds would be available to purchase the resources needed for the new course. On November 13, 1999, a column in *The Toronto Star* suggested government funding for education was not commensurate with the scope of the changes to be implemented in the curriculum (Urquhart, 1999). This column was followed on November 17, 1999, with the headline story, “Ontario Plans \$800 Million Education Cuts” (Walkom, 1999). The government's response to these news items was contained in an open letter to members of school councils and school principals, from Janet Ecker, Minister of Education. On November 18, 1999, she wrote:

I am writing to respond to concerns you may have because of recent news stories claiming the Ontario government plans to cut funding to schools. These reports are wrong. In the *Blueprint* campaign document for the 1999 election, the government clearly spelled out its priorities for education: ‘to guarantee the financial resources needed to improve our education system, overall education funding will be preserved and funding for education will increase to match rising enrollment’. This is a promise made, and a promise we will keep (Ecker, 1999).

The letter from Ecker suggested funds would be available to cover the cost of acquiring materials but Bev Buxton at Nelson recalled hearing, as late as January 2000, a rumour to the effect that additional government money would not be available to purchase materials for the new curriculum (personal interview, December 15, 2000). It was not until February 1, 2000, that the actual announcement of funds to pay for resources for the new course was made. On this date, the Ontario government stated that \$30 million would be available to cover the cost of grade ten textbooks and learning resources to support the new curriculum for the 2000-01 school year (Enhancing quality..., 2000). The promised funding, referred to as the “Investment in Secondary School Learning Resources Initiative, Grade 10, 2000” (the Initiative), was subject to specific conditions. In the announcement of the Initiative, the government stipulated that only textbooks or resources that had been either produced or manufactured in Canada, and approved by the Ontario Curriculum Clearinghouse (the OCC), would be eligible for purchase under the program (Enhancing quality..., 2000). This announcement was followed by the issuance of a Call for Resources for a career studies textbook and teacher’s manual.

Under the terms of the Initiative, the responsibility for determining if proposed resources met government requirements was delegated to the OCC. This agency, an independent, not-for-profit corporation, was established in 1994 for the express purpose

of evaluating educational material and providing support services to educators in the province of Ontario (About OCC, 2001). Textbooks approved by the OCC together with its review of the textbook are included in an on-line catalogue posted on the OCC's web site. Teachers in the Province who specialize in the subject area under review perform the evaluations for the OCC. The process examines the following items:

- Consistency with current curriculum standards
- Bias and inclusiveness
- Content relevance and accuracy
- Methodology-teaching and learning strategies
- Assessment and evaluation
- Accommodations and adaptations
- Resources
- Classroom friendliness
- Physical production standards
- Overall quality

(The review process, 2000, p.1)

With respect to the "Investment in Secondary School Learning Resources Initiative, Grade 10, 2000", the OCC posted a "Key Features" document on its web site, listing information pertinent to the submission of materials, the timeframe for submission and evaluation of materials, and the timeframe for ordering and receiving payment for textbooks (Key features, 2000). According to this listing, a publisher submitting careers studies material for evaluation had to send a copy of the proposed textbook, the proposed teacher's manual and a completed OCC submission form. This last item required the publisher supply information as to the following:

- 1) The contact person for OCC purposes
- 2) The contact person to be listed in the web catalogue
- 3) The book title, the ISBN, the year of copyright, the year of publication
- 4) Name and nationality of the authors and editors of the textbook
- 5) The country the textbook was manufactured in
- 6) The list price of the textbook
- 7) The grade the textbook was written for
- 8) The key words to be used to identify the textbook in an internet search

- 9) The description of the textbook (to a maximum of 300 words) the publisher would like to post through the OCC on-line catalogue (Developers' submission form, 2000).

Proposed texts or materials could be submitted for OCC evaluation between April 5, 2000 and May 19, 2000. The evaluation process would be completed by June 7, 2000 and a listing of all approved materials would be posted no later than June 9, 2000. Orders for approved materials could be made to publishers by a district school board or by a school through May 1, 2000, to July 7, 2000. Only materials purchased within this prescribed timeframe would be eligible for payment under the government's program (Key features, 2000).

The time available to a school or school board to review proposed texts, decide on a particular book and place its order with the publisher of the opted-for book under the Key Features timeline was tight. Orders had to be placed no later than July 7, 2000. It is reasonable to assume that persons entrusted with deciding which textbook to purchase for the new careers course would monitor the OCC web site waiting for the all-important posting of approval by the OCC before expending serious time and energy to review a proposed text. Accordingly, it was incumbent on publishers to make sure their product was in the hands of the people deciding which book to buy at an early date; to make sure the hurdle of OCC approval was accomplished in a timely fashion and to make sure all sales and marketing efforts were fully implemented before July 7, 2000.

Nelson's book received OCC approval on May 31, 2000 (Description and review: Nelson..., 2001). On this date any school or school board reviewing the Nelson textbook would know that purchase of this book would be fully funded under the "Investment in Secondary School Learning Resources" program. The book submitted by

Pearson did not receive OCC approval until June 7, 2000 (Description and review: Careers 10, 2000). It is impossible to know how many decisions as to which books to adopt were made during this week but Mark Cobham expressed the view that most boards, including the largest, the Toronto District School Board, made their decision as to what textbook to buy in the first week of June, 2000 (personal interview, September 19, 2000). Sue Cox echoed this view: “some of the schools were making decisions by the first week of June” (personal interview, July 19, 2000).

THREE

The Competing Products

The textbooks produced by Pearson and Nelson for the grade ten careers course were virtually indistinguishable. The Pearson textbook, entitled *Careers 10*, is a hardcover book with dimensions of 11 inches by 8.5 inches, comprising 236 pages. The glossy, full-colour cover has the title centered at the top, the authors' names positioned at the bottom and the middle made up of collage of pictures featuring students at school and at play, places of work, and of a protractor, interspersed with the words "Resume", "Decisions", "Career Portfolios", "Work Experience", "Community Service", "Co-operative Education", "Extracurricular Activity" and "Goals". The dominant colour of the cover is blue. The material is divided into three units: "Who Am I?", "Where Am I Going?" and "How Will I Get There?". The content reflects a lot of design work; almost every page has a picture or graphic material. The book contains a glossary and an index.

The textbook created by Nelson, entitled *Career Studies 10*, is a hardcover book with the same dimensions as the Pearson textbook. The glossy full-colour cover has the title centered at a two-inch drop from the top, with the company name in a rust-coloured box in the upper left corner. The cover is similar to that of Pearson's with a collage of images—parts of charts that suggest radar tracking are set against an off-centered picture of a fragment of a device. The words "Choose, Adapt, Dream, Plan" are listed to the left of the device, while the words "Learn, Connect, Focus, Research" are listed on the right-hand side of the cover. The dominant colour is blue, a shade darker than that used by Pearson. The book comprises 246 pages, including a glossary and index. The material is

divided into five units: “Why Am I Doing This?”, “Who Am I?”, “What Is Out There For Me?”, “How Do I Get Where I Want To Go?” and “How Far Have I Come?” Like the Pearson textbook, there is design work on almost every page of the Nelson textbook.

The textbooks produced by Pearson and Nelson for the careers studies course look and feel the same. The review comments made by the OCC with respect to the content of the competing books were virtually identical. With respect to the Pearson text, the OCC produced the following description:

Content: Each of the three units in the student textbook poses questions to focus the study and introduces the topics in clear, student-friendly language. A recurring feature, “A Day in the Life” sets a context for the topics addressed within the unit. Key terms are highlighted within the text and explained in an accompanying mini-glossary. The information for each topic is supported by appropriate skill-building techniques and varied activities that promote critical thinking and problem solving. Frequent links are made to further information through the Internet and to the students’ portfolios and journals. End-of-unit activities provide opportunities for Internet research, self-reflection, and independent and group work.

Methodology: The text provides a variety of approaches for students to build on and explore existing skill. The use of quizzes, questionnaires and other activities allow the student to connect material to personal experiences.

Assessment: The unit activities and “Journal Topics” emphasize ongoing reflection and self-assessment, and reinforce the value of prior learning. One activity in each “Careers Portfolio” section deals with the students’ Annual Education Plan. Assessment strategies and rubrics are included in the Teacher’s Guide.

Format: The information is presented in a logical and user-friendly format. Colourful charts, diagrams, and photographs add appeal and support student learning. A comprehensive glossary of terms is included.

Bias: The student textbook presents a balanced perspective of the diversity found in classrooms, schools and Canadian society
(Description and review: Careers 10, 2000, pp. 1-2)

The review comments made by the OCC on the book produced by Nelson are almost verbatim the comments posted on the Pearson textbook. With respect to the Nelson book, the OCC stated:

Content: Each unit in the student textbook is built on a pertinent question that students can use to guide their decisions and plans for the future. The overview for each unit identifies key learnings and sets a context for the study, using an initial activity and a personal story to which young people can relate. Each section within a unit examines a major aspect of the unit focus. In the activities that immediately follow the information, students consolidate and apply their learning. The “Links” feature directs students to relevant sources of information in the community and in the workplace. An extensive glossary defines key terms used in the text information.

Methodology: The student textbook uses an inquiry approach that involves students in research, analysis, application, and reflection, and that fosters the development of critical thinking skills. Students build a Career Portfolio of their work throughout the course and review its contents at the end of each unit. The Teacher’s Guide suggests a variety of learning strategies and includes the blackline masters to support the activities.

Assessment: The “Reflection” feature found throughout the textbook reinforces prior learning and helps students connect it to their current experiences. Each unit summary includes activities presented under headings that correspond to the categories of the Achievement Chart in the curriculum document. The Teacher’s Guide includes a variety of assessment strategies, rubrics and checklists and blackline masters for student self-assessment.

Format: The format of the textbook is attractive and engaging. The clear, concise and readable language used in the book is enhanced with charts, graphs and diagrams. Effective use of colour, photographs and illustrations add interest and appeal.

Bias: The student textbook accurately represents the diversity in Ontario’s classrooms and in Canadian society
(Description and review: Nelson..., 2000, pp. 1-2).

The salient review comments made by the OCC with regard to the textbooks of Pearson and Nelson confirm the similarity of the content in the competing products. Under the first segment of the OCC review, the content of each text is described as

dependent on a question posed. The Pearson book “poses questions to focus the study”, while the Nelson text is “built on a pertinent question that students can use to guide their decision”. The content of both textbooks is described by the OCC as using a story and activity format. The Pearson textbook “sets a context for the study by using an initial activity and a personal story”. In the Nelson book, “the recurring feature of ‘A Day in the Life’ (a story) sets a context supported by varied activities”. The content sections of both OCC reviews note the existence of glossaries and links to outside sources of information. The methodology review segment of each book states the same end, the development of skills, is achieved in both, though the Nelson book is said to depend on “an inquiry approach” while the Pearson textbook uses a “variety of approaches” to foster skill development. The methodology of both refers to the building of a career portfolio, an objective established in the ministry document (Guidance and career..., 1999, p.11). The OCC notes the assessment features of each text emphasize repetition of concepts and encourage introspective thinking by a student. The Pearson text is said to “emphasize ongoing reflection and self-assessment, and reinforce the value of prior learning”, while the Nelson book “reinforces prior learning and helps students connect it to their current experiences”. The format comments made by the OCC also overlap. Pearson’s book is “user-friendly”, Nelson’s is written in “clear, concise, and readable language”. In the opinion of the OCC, both textbooks have appeal added through the use of colour, charts and photographs.

The book descriptions included by the respective publishers for the OCC on-line catalogue contain similar information listed in a similar format. In the catalogue description; arguably a place to market the textbook; both Pearson and Nelson limit the

description of their products to a listing of the sections in the textbook and a short-listing of special features. Pearson provided the following description of its textbook for the OCC catalogue:

Careers 10 is a new text developed specifically to meet the expectations of the compulsory Career Studies course at Grade 10. The text is organized into three units, Who Am I?, Where Am I Going?, and How Will I Get There? They correlate directly to the self-career exploration and planning process. *Careers 10* is written in a lively, interactive style designed to attract and hold student interest. The student-friendly language and format of the text, the variety of relevant activities, and the cumulative career studies portfolio project makes this text especially suitable for the wide range of students who will be taking the Career Studies course.

Special Features include:

- Inviting two-page spread format designed to engage the students and hold their interest with realistic and relevant examples.
- Variety of activities – individual, pair, small group, partner, group, class discussion. Activities range from short answer to open-ended, paper and pencil to performance based.
- Journal topics designed for reflective learning.
- Career Portfolio Project – a cumulative or culminating project designed as a guide to assist students to showcase their skills and abilities.
- Web site icons are included throughout the text to enable the students to extend their learning and to provide up-to-date information on related topics
(Description and review, *Careers 10*, 2000, pp. 2-3).

The Publisher's Description included by Nelson in the OCC catalogue presented the information in an order opposite to that of Pearson, placing the 'special features' first:

- New process-orientated text written specifically for Ontario Career Studies 10
- Thematic organization corresponds to the curriculum strands
- Designed to accommodate a wide range of learning styles
- Support for the use of technology including links to electronic resources

The Student Text is organized into five thematic units that are titled according to the key question that shapes the unit:

FORWARD: HOW TO USE THIS BOOK

UNIT 1: WHY AM I DOING THIS?

An introductory unit that presents the formative-based decision model that are used in later units.

UNIT 2: WHO AM I?

Corresponds to the “Personal Knowledge and Management Skills” curriculum strand.

UNIT 3: WHAT’S OUT THERE FOR ME?

Corresponds to the “Exploration of Opportunities” curriculum strand.

UNIT 4: HOW DO I GET WHERE I WANT TO GO?

Corresponds to the “Preparation for Transitions and Change” curriculum strand.

UNIT 5: HOW FAR HAVE I COME?

GLOSSARY

INDEX

The structure of the text is clear and consistent. Each thematic unit begins with a Title Page that asks the key question that shapes the unit. The Unit Overview elaborates on the key question and states in student-relevant language the curriculum specific expectations covered in the unit. An introductory Unit Story is used to illustrate the main theme of a unit. The unit Sections contain the main content and context for each unit and feature the following: Activities, Case Studies, Profiles, Links to external information, Discover and Reflection activities, and content pieces. Portfolio building activities are integrated throughout the text. Unit Summaries allow student the opportunity to review and reflect, and provides opportunities for summative assessment (Description and review: Nelson, 2000, pp. 2-3).

The descriptions of the competing textbooks furnished by each publisher for inclusion in the OCC catalogue made reference to the same features and implicitly suggested the textbooks were similar. Both Pearson and Nelson stress compliance with the curriculum requirements: A statement to this effect is the opening comment in the description provided by each respective publisher for the OCC catalogue. Both state in the early part of their descriptions that the content of their textbook is designed for a wide

range of students. Both make mention of the technology links included in their materials. Both reiterate the OCC comments that the textbook is readable; Pearson says that its textbook is written in student-friendly language while Nelson uses the phrase student-relevant language to describe its textbook.

Mark Cobham expressed the view that the textbook produced by Pearson was similar to the textbook produced by Nelson (personal interview, September 19, 2000).

The textbooks sold by Pearson and Nelson were indistinguishable but one small point of difference was initially noted. The advance copies of *Careers 10* did not contain an index. A teacher who had received an advance copy called Pearson's head office inquiring about the index and asking specifically if the final version would include this section. (It was included in the final version of the book.) It cannot be determined if the failure to include an index in the advance copies affected the final sales figures but the fact that there was only the single call regarding this matter suggests the lack was not viewed as a deficiency. Susan Cox did not believe the initial lack of an index constituted a problem with the book: "The structure of the book is set out in the table of contents, so I don't think an index is a critical thing"(personal interview, July 19, 2000). Mark Cobham was also of the opinion that the lack of an index in the advance copies did not affect the sales of the Pearson textbook (personal interview, September 19, 2000).

Indirect support for the opinions of Cox and Cobham regarding the lack of an index is apparent not only in the lack of feedback—there was only the single call—and in comments made by a teacher at a presentation meeting held in the school district of Halton by Susan Cox:

...She [the teacher] offered that she thought this was best book she had ever seen. She felt it would meet the needs of all the kids out there because

they different learning styles and this was the type of resource they needed for this course (personal interview, July 19, 2000).

The end products of Pearson and Nelson were virtually indistinguishable, but the time devoted to product development differed greatly between the competing companies. Pearson began work on *Careers 10* in late January of 2000; a full five months after Nelson had started developing its textbook. At the time Pearson deliberated on the feasibility of the project, personnel connected to the book development believed they possessed material that could be re-worked; that could expedite the development of a new textbook for the career studies course. Prentice Hall Canada had published *Lifechoices*, a four-volume modular series on the concept of a career. It was thought that this series could furnish the bulk of the material needed to fulfill the curriculum guidelines set by the Ontario government. Rob Greenway described the *Lifechoices* series:

[It] was premised on preparing for kids a range of resource material relevant to what were called, at that time, Career and Life Management courses across Canada, that were compulsory in provinces like Manitoba, Alberta and, intended to be in, Nova Scotia. They did not exist in Ontario, but we made a decision that we had a good concept and an interesting idea. We had an indication from Alberta that they were interested in new resources for this course called CALM [Career and Life Management] and we went ahead and published a four volume modular series, made it very student friendly and appropriate for kids. So we developed that through 1995-1997, and published the last volume in 1998 (personal interview, June 28, 2000).

Greenaway's early assessment was that the *Lifechoices* series of volumes could furnish about 80 percent of the content required for the new Ontario course; that the information contained in the modular series together with a teacher's guide would meet ministry requirements:

My original concept was that we'd be able to use close to 100 percent of the material...when the careers curriculum came out, we looked at it and said we can submit three-quarters of our volumes and cover the

curriculum and the teacher guide... We made that decision [the decision to produce a careers textbook] based on the premise that 80 percent of the material we already had and [it] could be reused (personal interview, June 28, 2000).

This early assessment as to the use of the *Lifechoices* material proved to be erroneous. Susan Cox and Anita Borovilos conducted a gap analysis between the content in *Lifechoices* series and the requirements set out by the ministry in the Guidance and Career Education document. The analysis concluded the existing material did not correspond with the government's statement of course expectations; and, more pointedly, the format was not appropriate. A textbook rather than a series would be required to meet the curriculum guidelines set for Ontario schools. Rob Greenaway described the change in approach:

So while we could say the four volumes of the *Lifechoices* series and the teacher material would cover the curriculum, we felt the answer back from Ontario would be: "But it's not a textbook and it's not word for word written to our expectations". When we came to that conclusion we went back to the drawing board and said what can we do to meet the requirements in Ontario. The first [requirement] was that it had to be a textbook, rather than a modular soft cover series. Well, we then decided we could integrate the key concepts from the four volumes into one textbook. We ended up creating a lot more than we used. In the original series, there were no student activities; it was strictly a magazine (personal interview, June 28, 2000).

The Pearson team started writing the textbook in late February of 2000. Mark Cobham assembled a small team of writers. Cobham explained the pressure of time necessitated a small group: "With a timeline this tight you need a small number of people, too many people make it difficult to pull it all together; so we went with people that we knew, are known in the field with good credentials and asked them" (personal interview, June 28, 2000). Rob Greenaway was of the same view: "Because of the timelines...we needed two things. We needed Ontario-based people who knew what the

curriculum was and were prepared to respond to it, and we needed people who had the time to do it” (personal interview, June 28, 2000). Pearson hired Kelly Hoey, the Community Outreach Director for the Halton Industry Education Council-Career Centre, and Anne Clifton, the Coordinator of Guidance and Career Education for the Halton District School Board, to write required textbook. The choice of authors was also partly predicated on marketing concerns. As Mark Cobham stated:

We wanted some people who did some writing and whose networks would spread across the Province so people saw their name and recognized them as being knowledgeable in the guidance field. We wanted the reaction to be: “I know Anne Clifton and Kelly Hoey and I’d buy their book” (personal interview, June 28, 2000).

Judith Campbell, the author of *Lifechoices*, though listed as an author of *Careers 10* because some of the *Lifechoices* material was included in the new textbook, did not participate in the writing of the new textbook. Rob Greenaway described the relationship between Judith Campbell and Pearson with respect to *Careers 10*:

We needed to alleviate her [Judith Campbell] concerns that we were taking her material, jamming it into an Ontario curriculum and ignoring the original conceptual design and why it had been created that way. Because of the timelines we didn’t feel that she could contribute in a significant way to the book. We likely would have involved Judith had we started earlier but for a variety of reasons we didn’t get to the chase until very late so by the time we were in a position to even talk to Judith about what her role would be, we no longer had time to involve her. It was a process of negotiating an agreement that basically said: you guys go ahead and do what you want, I trust you and my payoff will ultimately be recognition as a senior author, plus full royalties on sales (personal interview, June 28, 2000).

In Cobham’s view the Pearson team “ended up writing almost an entirely new book” in a timeframe that was “an absolute crunch”. The normal time frame, in Cobham’s view, for development of a textbook was from 10 to 12 months (personal

interview, June 28, 2000). Kelly Hoey and Anne Clifton had less than half this normal time frame. For Kelly Hoey, this was a first time writing a book, but Susan Cox believed Hoey's background of working with kids was of greater import than any writing experience:

The most relevant thing, I think, is that she works with kids. It's one thing say to write a textbook for this area but you have to look at who is going to use it and what the kids are going to get out of it. I was at a presentation in Napanee and one counselor said all eight kids he asked to look at the texts choose the Pearson title. He was surprised by these results so he got 20 kids to look at the books and 16 of the 20 choose ours (personal interview, June 30, 2000).

The timeline was tight for the authors of the Pearson book and the time constraints were complicated by the format of the actual textbook. An inordinate amount of design work was included in the textbook. As noted by the OCC, the Pearson textbook contained "colourful charts, diagrams and photographs" (Description and review: Careers 10, 2000, p. 2). There is design work apparent on almost every page of the textbook. In this respect as well the time factor was compounded by the view that the *Lifecoices* series would furnish the needed material. With respect to the design framework, Mark Cobham stated:

We really inherited it. It was not really a decision that was made. At the time when we thought we were picking up a lot of the series [Lifecoices], we picked up largely the template from the existing books – the ones that were done for Alberta. So we thought we'd be picking up a lot from those materials – as it turned out we didn't but we started with that kind of magazine template (personal interview, June 28, 2000).

The time was tight for the Pearson team, but the textbook was produced in the record time of less than five months. People at Pearson were pleased with the final product. Susan Cox observed that the book was put together with incredible speed but that she was pleased with the book; that she thought the content was solid, an opinion

fortified, in Cox's view, by the fact that she heard no complaints about the Pearson textbook (personal interview, June 30, 2000). Rob Greenaway said he thought the Pearson's final product looked great (personal interview, June 28, 2000).

In contrast to Pearson, Nelson had a full timeline to work with in the production of the textbook and they made use of it. In August of 1999, a full five months before Pearson decided to produce a careers studies textbook, David Steele discussed preparation of a book for the new careers course with Beverly Buxton who began work on the new book immediately and worked exclusively on this project for the next 10 months (personal interview, July 31, 2000).

Pearson had begun its development process by assessing available resources. Buxton started from the same premise but looked much further afield than in-house resources. Buxton started by reviewing material assembled by the Centre for Education and Training, a not-for-profit organization founded by the Peel District School Board. The Centre offers training programs and provides career resource services. It is also the developer of an electronic job search software program. In 1999, the Centre was involved in a study entitled "An Environmental Scan: Youth and Entrepreneurship in the Region of Peel". The study surveyed over 200 young people; gathering information about persons interested in developing their own businesses or involved in entrepreneurial endeavors, and resulted in the development of a resource guide directed to youth. In Buxton's view, the material available at the Centre furnished information that could be incorporated, on a piecemeal basis, into the textbook. The Centre also put Buxton in touch with Joanna Twist, of the Peel District School Board, who Buxton described as being "incredibly helpful" and "very well-connected". Twist provided Buxton with a

listing of individuals throughout the Province connected to the area of guidance and career education and Buxton embarked on comprehensive fieldwork. Through the fall of 1999, she traveled extensively in Ontario, discussing the new proposed course with teachers and guidance counselors; soliciting advice on the proposed book. Buxton's research was summarized in a report outlining the kind of book that was needed and noted that there was "a huge amount of career information available on the web, in employment agencies and guidance offices". The issue, in Buxton's view, was how to "put a context to it [the available information] and to help people make use of it in a relevant way." The report culminated in the formation of an advisory board; an eight-member group of teachers and guidance personnel from various school boards. Buxton described the group in the following way:

We had people at her [Joanna Twist] level, which is really high, big-picture level, right down to a young teacher who had only been teaching a few years. They gave a variety of input. We met four times over the course of it [book development] (personal interview, December 15, 2000).

The Nelson text was written over the course of eight months with the benefit of information gathered by Bev Buxton and input from the members of the advisory board. Pearson worked largely in-house, and, in less than four months, produced a comparable book. In the process of book development, both companies wanted to forge a connection between their book and the ultimate buyers. Pearson sought to achieve this goal through its selection of authors: Kelly Hoey and Ann Clifton were chosen because it was thought buyers would recognize their names and be favorably disposed toward the book. But Nelson, with more time at their disposal, was able to forge a bond between its textbook and a large segment of the market. Months before Pearson had committed to the production of a textbook for the career studies course; Bev Buxton was active in the

marketplace; canvassing educators, asking their advice on the textbook and forming the advisory board to actively involve educators in the development of the final product. In

Buxton's view:

The development of the manuscript also turned out to be an exercise in marketing... by the time we were ready to go [to publish the textbook] the major players across the Province had seen the material and had had actual input into how it [the textbook] was going to turn out. So a lot of people were really behind the project before we had a printed book, which was really key to the marketing efforts. It wasn't a hard sell because I got to know a lot of people and they knew what was going on and were very familiar with the project (personal interview, December 15, 2000).

David Steele, Director of Publishing – School Division, at Nelson also credits

Buxton's work in the field as the factor behind the level of success of *Careers Studies 10* (personal interview, July 31, 2000).

FOUR

The Sales Process

Pearson determined at the end of January 2000 to do a textbook for the careers course. The reason to go ahead with this book at such a late date was simple: The break-even point established for the book was low. In an interview, conducted before the final costs on the book were quantified, Rob Greenaway summarized the thinking behind the decision to do *Careers 10*:

We could argue that the investment that we made would be, guessing, 60,000 dollars in plant costs and 40,000 dollars in editorial costs plus authoring costs plus marketing costs that we were risking a hundred thousand dollars. We could see a break-even very low. So if we sold 10,000 copies we'd break even, if we sold 20,000 we would make a pretty good margin in one year.

The existence of material from *Lifecoices* further contributed to a positive assessment from a costing perspective; it provided "... an opportunity to re-purpose that asset (*Lifecoices*) ... likely 80 percent of what we already written would be reusable and our costs would be lower" (personal interview, June 28, 2000). The actual costs for the *Careers* text, compiled by Barbara Webber, were consistent with Greenaway's estimate. In September 2000, Webber tabulated the costs of the Pearson textbook at \$100,615.00 (personal interview, September 15, 2000).

Cobham concurred that the availability of an existing asset was a contributing factor to the decision to do a Career Studies textbook but describes the decision to go ahead as being market-driven: "once we discovered there was some existing material, the market pushed us the rest of the way" (personal interview, June 28, 2000). The market

was clear. The potential for sales of a Career Studies text was 80,000 copies. Pearson would need to sell to only 10,000 copies, or capture 12.5 percent of the market to break-even. The decision to go ahead with the proposed text, though clearly sound from a basic costing overview, was made late by Pearson. The timing of the decision meant existing marketing plans for the year 2000 would need to be reformulated and Rob Greenaway believed that doing so was not feasible:

We weren't in a position to add another start-up operation to our marketing plan...we were at our maximum capacity...to add another book would weaken established marketing plans for the other titles or series [Pearson was selling in 2000] (personal interview, June 28, 2000).

Pearson chose not to alter existing marketing plans. This decision had two ramifications: The sales representatives at Pearson were left out of the marketing process, and no actual plan for marketing the careers textbook was formulated. Sue Cox, hired on contract by Pearson to act as the developmental editor, inherited the task of marketing *Careers 10*. As she explained, she performed a dual function:

Careers was a little different because I had to do both ends of things and in some cases there were still editorial issues to deal with while the marketing was starting to be put in place. So the marketing was a bit different for a couple of reasons... It was decided to have the marketing done through 1-2 people, which turned out to be the author and me (personal interview, June 30, 2000).

Pearson's marketing process started with a facsimile sent by Sue Cox in February to the schools that would be offering the careers course. The facsimile requested information about the course and asked the recipient to identify the party that would be deciding which book to buy. It was apparent that a variety of people could possibly be making the purchasing decision—in some instances it would be at the board level but other boards were allowing the schools to decide on the text. As Sue Cox noted:

Some boards were going with board-wide adoptions, while others were leaving it up to the individual school. Sometimes no one knew so we asked if it was going to be a board decision or a school decision (personal interview, June 30, 2000).

In April, Pearson mailed a flyer to all the schools that were offering the new course. This front page to this document was a full-colour reproduction of the cover of *Careers 10*. The inside information, in a black-on-white format, included a listing of four features of the book, emphasizing in bold print that the book had: self-contained topic segments, student activities, a Career Portfolio and a comprehensive Teacher's Resource Manual. The inside information included short content overview- a listing of the units in the textbook with a short summary of the content of each unit. The table of contents of the new book was reproduced on the entire right-hand side of the inside of the flyer together with the announcement that *Careers 10* would be coming June 1.

In mid-May, Pearson printed 750 cerlox-bound copies of the new book. Copies went to individuals who had requested them or were provided directly to educators and school board members by Susan Cox.

At the end of May, Pearson mailed out 750 marketing kits to the schools and school boards across the Province. This package consisted of the flyer sent in April and two advance copies of the textbook. Subsequent to this mail out, Pearson received approximately thirty telephone calls from individuals at schools and at school boards requesting additional information or additional copies of the book. Though the school or school board had received the package, in some cases it had not gone to the right person or the two copies were insufficient because more than two people were asking to have a look at the new textbook. Pearson had decided on a small advance print run of 1500

copies, all of which had been sent to persons identified or presumed to be connected to the decision making process. No copies were available to send in response to the requests for more textbooks.

Pearson hired two telemarketers to make promotional calls to the schools, as a follow-up to the mail-out. It was intended that the telemarketers would establish contact and encourage the educator to call Pearson for further information about its new textbook. I was the person in-house designated to field the calls for more information. I received only one call.

The mail-out of the advance copies was followed by presentations, made by Cox or one of the authors, before the adoption committees representing the boards. These presentations were scheduled by the boards and, as Cox explains, were within a short time frame:

In a lot of cases boards had presentation schedules they set up for the publishers and I think that we often joke about the fact that it was almost like a campaign bus or something, because we would go from one board to the next, sometimes having two presentations in one day (personal interview, June 30, 2000).

The marketing of *Careers Studies 10* by Nelson effectively began with compilation of the textbook and the contacts forged by Bev Buxton. Nelson built on the efforts of Buxton in its marketing process; a process it began as early as September of 1999, a full five months before Pearson had determined to enter the market of careers studies. At the fall sales conference, held in September of 1999, the sales representatives at Nelson were informed that the company would be offering a textbook for the new careers course. In the fall of 1999, the sales force helped Buxton contact the schools, sending her the names of people they thought would be key to the decision making

process. Peter Cameron described the process of establishing contact with the schools: As early as November of 1999, two months before Pearson committed to the development of a text, Nelson announced in a facsimile sent to all the secondary schools in Ontario that it was planning to publish resources for the new course. The facsimile sent by Nelson contained nine questions with a listing of multiple-choice answers. Three of these questions were related to the purchasing decision. Two questions related to teaching concepts, asking the recipient to check the items they believed were important in terms of “practical delivery issues” and “pedagogical issues”. The remaining multiple choice questions sought information about “resource” items, asking the recipient to check the available electronic resources, the available print resources or to check items required in a resource package, or items that would be useful ancillaries. The facsimile also had one open-ended question that asked the recipient to list the three most-important things they would look for in a careers studies textbook. With return of the facsimile, the sender was entitled to receive Nelson’s Vocational Interest Experience and Skill Assessment materials for testing of a group of 25 students. The facsimile also asked the recipient if he/she would be interested in reviewing the material for the course (personal interview, December 15, 2000).

At Nelson’s January sales conference, the author and some advisory panel members made a presentation pertaining to *Career Studies 10*. In February, Nelson sent a fold-out flyer to all the schools and school boards announcing *Career Studies 10* would be coming in Spring 2000. On the back of this document, Nelson listed the members of the advisory panel and stated that more than 40 reviewers would be involved in the book review. In bold print beneath this information, was a listing of the school boards with the

name of the sales representative serving that board that was connected to the Nelson textbook. The inside of the flyer listed over 20 features of the Nelson textbook grouped into sub-headings under the heading “You asked...we listened.”

In April, Nelson sent a seven-page brochure promoting its new text. This was a large (9” x 12”) full-colour document that reproduced sections of the book with promotional sidebars, again with the sections grouped under the same sub-headings used in the flyer sent in February. The back of the brochure listed the members of the Advisory Panel and named 23 teachers who acted as reviewers. In early May, Nelson sent 5,000 evaluation texts out to the schools and school boards. The evaluation text was part of a kit that included the Teacher’s Resource Sampler, an overview page, a correlation statement juxtaposing the expectations contained in the Curriculum Guidelines produced by the Ministry of Education and the relevant sections of the book, and a page announcing that Nelson would have a supplement applicable to the text intended for use in Catholic schools.

Bev Buxton explained that while the head office of Nelson was preparing and sending off these materials and the advance copies of the book, the sales representatives were actively promoting the new textbook in the schools and at the school boards. Nelson also promoted its textbook through the presentation sessions scheduled by the school boards (personal interview, December 15, 2000).

FIVE

Analysis

In *1001 Ways to Market Your Books, 5th Edition*, author John Kremer includes the “Eight-Step Sell Them Process”, a list compiled by Tami DePlama and Kim Dushinski of MarketAbility, a Colorado-based book publicity and promotion firm. According to DePlama and Dishinski, the factors; listed through use of the phrase “Sell Them” as an acronym; that determine sales success are the following:

- S Seek out the best matches for your book. Prioritize and start from the top.
- E Explain the benefits of your book for the particular market you are pursuing.
- L Locate the exact person who makes the decisions to purchase the book for the purpose you are intending by calling the company or organization.
- L Let that specific person get excited about your topic. Use a summary of benefit statements about your book. Get them to talk a lot. It’s the only way you can truly know what their needs and problems are – and how you can answer their wishes!
- T Talk them into asking you to send more information. Ask them questions about what they want or need. When you demonstrate that your book fits their bill, they will want to see a copy.
- H Have your book, complete with a cover letter and a small, yet impressive selection of your marketing materials, sent immediately. Make sure to include anything they may need to make a decision.
- E Establish contact within ten days to two weeks to make sure the packet reached them safely and determine their interest level.
- M Monitor their interest, answer their objections, follow-up, follow-up, follow-up and Close The Sale!
(Kremer, 1998, pp. 633-634).

Use of this formula as the “acid-test” for sales of the careers textbooks provides a basis for comparing the marketing efforts of Pearson and Nelson and identifies the factors

that contributed to the sales of the Nelson text. In particular, use of this formula explains the persuasive contribution to sales made by Bev Buxton's efforts.

Item number 1 – Seek Out the Best Matches for Your Book. Prioritize and Start From the Top.

In the matter of the careers studies textbook, a match for the book was predetermined: Schools in Ontario with grade ten enrollment would be expected, in September 2000, to offer the new course and accordingly, would need new materials for the new careers course. The match was clear but the need to “prioritize and start from the top”; or identifying and concentrating on the schools and school boards that would be purchasing for a greater student enrollment; was a marketing step to be implemented. In September 2000, there were 58 school boards across the Province that would conceivably be purchasing textbooks for the career studies course. But the size of the boards; measured in terms of the number of students in the secondary schools administered by the school board; varied greatly. In September 2000, the largest board, the Toronto District School Board, represented over 98,000 students or 19.48 percent of the total market. The smallest board, the Kenora Catholic District School Board, represented only 187 students or less than 1 per cent of the total market. The three largest boards; the Toronto District School Board, the Peel District School Board and the York Regional District School Board; represented about 25 percent of the total market (District school board profiles, 2001). Concentration of marketing efforts at the eight largest school boards, or 14 percent of the total number of boards, would translate into marketing to 45 percent of the market. Marketing in accordance with DePalma-Dushinski formula would suggest “prioritizing” by directing sales efforts towards the large school boards; to the “big eight”. The

marketing process of Nelson reflected a focus on the big eight school boards. As Bev Buxton had noted in describing the process of the book development undertaken by Nelson, she worked actively with an advisory panel and that this group met on four separate occasions to discuss and offer advice on the compilation of the Nelson textbook. A large group of reviewers, teachers from various school boards in Ontario, were also connected to the Nelson textbook. The members of the advisory panel included individuals from five of the eight largest school boards. These five individuals were connected to boards that comprised 31.4 percent of the total market. The two largest school boards, or 20 per cent of the market, were both represented on the advisory panel. The reviewers associated with the Nelson textbook represented seven of the large eight boards, the only “big eight” board that was not connected to the Nelson book development process was the Thames Valley District School Board. The entire group of reviewers connected with the Nelson textbook was drawn from 20 different school boards or boards that represented 58 percent of the market (District school board profiles, 2001).

As the numbers indicate, with regard to the first step in the DePalma-Dushinski formula, Nelson prioritized and started from the top by forming a bond with individuals connected to the large school boards. The bond between Nelson and a large sector of the market was formed early; the advisory panel was formed in the fall of 1999; and was cultivated throughout the process of preparing the textbook. Pearson did not form an early connection to the market as Nelson had. The first indication that Pearson would produce a textbook for the new careers course was the facsimile sent in February 2000 to schools seeking information about potential contact people and views on the book. At the time of the Pearson facsimile, Nelson was actively working in tandem with people

connected to a large segment of the market to produce a textbook. Further, Pearson did not have the benefit of a close connection between its book and the large school boards. Pearson did have six reviewers connected to their book but these individuals were associated with only five different school boards; boards that represented 25 percent of the total market (District school board profiles, 2001).

Item number 2 – Explain the benefits of your book for the particular market you are pursuing.

In the flyer sent out by Nelson to all the schools and school boards in February of 2000, the “benefits” of the book were explained under the bold heading “You asked...we listened”. The first feature listed under the “we listened” column was curriculum congruency; Nelson stated that its textbook fulfilled the curriculum guidelines set by the Ontario government. The other points listed in the flyer addressed concerns teachers would have regarding the new material. Under the “You asked” column, Nelson included the questions:

- How does Nelson *Career Studies 10* help students become lifelong learners?
- How is the use of technology supported in Nelson *Career Studies 10*?
- How will Nelson *Career Studies 10* accommodate the various needs of students in an open course?

Under the “We listened” column, Nelson explained how each of these government-set requirements were met by their new textbook. Nelson also addressed concerns teachers faced with an entirely new course might have; the brochure posed the question: “How will Nelson *Career Studies 10* help make planning and implementation easier and more effective?” The answer provided by Nelson was that the “structure and organization of the materials is clear and easy to follow.” More importantly, Nelson assuaged concerns

teachers had about the new curriculum. According to an article in the *Toronto Star* published on November 17, 1999 teachers in Ontario were “not happy” with all the curriculum changes imposed on them by the government (Walkom, T.) In the final selling feature listed under the “You asked...we listened” heading, Nelson stated that it had a “team of educators ready to assist in the implementation of the new curriculum”.

In the flyer sent in February, Nelson also informed the entire market that it was working with the advisory panel and that over 40 other people would be involved in the review of the book. This statement constituted a subtle suggestion of deference to one’s peers. Anyone reading the brochure could readily see that there were many teachers contributing or reviewing the product compiled by Nelson. The heading of “You asked...we listened” used in the brochure implied that the book developed by Nelson was a direct result of listening to teachers; the people directly concerned with the final book. The textbook was for a new course and, according to Mark Cobham, teachers faced with the new careers course were uncertain; that they “didn’t really know” what should be in a careers textbook (personal interview, June 28, 2000). Conceivably, teachers were not in a position to objectively assess the benefit of the new book by contrasting it with familiar resource material or by evaluating it against course outlines they had implemented. There was no clear frame of reference for an individual teacher assessing the new book and consequently, in determining if the book was “beneficial” (if it would meet their needs), a teacher would presumably defer to the fact that the book was developed with teachers in the field of guidance.

Promotional material sent by Nelson after the brochure sent in February 2000, built on the concept of explaining the benefits of its book. Included with the advance

copies sent out in early May was a detailed statement of concurrence between the curriculum guidelines and *Careers Studies 10*.

The efforts of Pearson to explain the benefits of its textbook to the market were on a far smaller and less-focused scale than the efforts of Nelson. In April, two months after Nelson sent out its flyer detailing the benefits of its textbook, Pearson sent out its flyer. This document did not expound on the benefits of *Careers 10*, it was predominantly a summary of what was in the book, a listing of the units to the book and the table of contents. Arguably, the only statements pertaining to the benefits of the new textbook were the four features listed in a space that comprised less than one-eighth of the total flyer. The back of the flyer was a reproduction of the back cover of the textbook. It contained information that was more accurately directed to students; telling them that the textbook is “all about you”; that it “will prepare you for a complex and changing world”. Here Pearson missed their audience, as students were not involved in the decision as to which textbook to purchase. The flyer sent by Pearson in April did little to propound the benefits of its textbook in the market as it was largely confined to a superficial description of the textbook and this flyer was a key part of the marketing material. It was sent out in April and again with the advance copies in late May, the only other promotional material Pearson sent was the cerlox-bound copies.

Item number 3 – Locate the exact person who makes the decisions to purchase the book for the purpose you are intending by calling the company or organization.

Pearson’s efforts with respect to this step of the DePalma-Dishinski formula were limited to a facsimile communication sent out by Sue Cox to the secondary schools in February 2000. Rob Greenaway noted that: “the reps didn’t call the guidance

departments” (personal interview, June 28, 2000). Pearson’s sales representatives were not part of the sales process for this textbook and accordingly there were no individuals working in the field to gather the crucial information as to who was making the purchasing decision. Susan Cox noted that Pearson did not have clear information as to what person or persons were responsible for the decision as to which textbook to buy for the careers studies course (personal interview, June 30, 2000). Effectively, Pearson failed to implement the third step of the DePalma-Dushinski formula.

The field research conducted by Bev Buxton; the close connection forged between Nelson and the schools and school boards through the advisory panel and the active use of sales representatives by Nelson resulted in better information as to who would be making the decision as to what book to buy. Bev Buxton stated:

The sales reps started off helping me get the contacts, they sent me the names of people they thought would have been key [to the decision as to which book to purchase]. They had been prompted right from the sales meeting at the end of summer. They knew the project was on and started calling—not aggressively—but they started finding people and sending names to me (personal interview, December 15, 2000).

David Steele at Nelson said that with respect to *Careers Studies 10* the need for involvement by the sales force was higher than normal because of the lack of certainty as to who was making the purchasing decision; that you needed people at the ground level to find out whom you should direct your marketing efforts at (personal interview, July 31, 2001).

Item number 4 – Let that specific person get excited about your topic. Use a summary of benefit statements about your book. Get them to talk a lot. It’s the only way you can truly know what their needs and problems are – and how you can answer their wishes!

Bev Buxton captured the attention of the educators and, indirectly, the people deciding what textbook to purchase by asking them questions, by encouraging them to offer advice on the new textbook. She got educators to talk; she asked what they wished to see in the new textbook. The interviews conducted throughout the Province, the use of the advisory panel, and the large number of reviewers would have created a groundswell of interest or excitement commensurate with participation. Even if the people interviewed, participating in the advisory panel, or reviewing the textbook, were not the actual buyers, there is no doubt that the buyers would be cognizant of the excitement in the Nelson product generated by the participation of so many educators.

Bev Buxton expressed the view that Nelson benefited from the perception, formed as a result of the participation of the advisory panel, that it was building a book from the ground up; that the education community had the notion that Pearson was working with previously used material (personal interview, December 15, 2000).

Pearson's marketing efforts failed to generate excitement in its product. Mike Czukar, the marketing manager at Nelson who was responsible for Career Studies 10, offered the view that:

People really didn't sense that Pearson was coming out with a book at all, prior to the actual launch of the book and it being approved by the ministry. The all-important word on the street was that Nelson was going to have a book because we were out there talking with people and getting it [the book] positioned...The sales reps knew what was going on from the beginning...in-house people knew from the start that a book was in the works (personal interview, February 27, 2001).

Item number 5 – Talk them into asking you to send more information. Ask them questions about what they want or need. When you demonstrate that your book fits their bill, they will want to see a copy.

Bev Buxton began by canvassing educators throughout the Province, asking questions about the new course; asking what educators knew about the new course and what they were looking for in a textbook. Nelson implemented this step in DePlama-Dishinski formula as early as September of 1999, and followed up with the facsimile of questions as to what educators thought would be necessary or useful with respect to the new resource sent in November. As early as January 2000, the sales representatives at Nelson were busy setting up presentations to promote and answer questions about *Career Studies 10*. The on-going work with the advisory panel ensured a flow of communication, an on-going opportunity to provide information about the new textbook and to solicit information as to the perceived wants or needs of the education community. The flyer sent in February with its “You asked...we listened” heading further emphasized the existence of communication links and the flow of information between Nelson and the education community with respect to *Career Studies 10* and demonstrated that its textbook “fit the bill”.

In contrast, Pearson’s development efforts did not forge the same connection between its product and the education community; there was no real process in place to “talk to educators” or request information from educators on the product. Development of the product was done largely in-house. Rob Greenaway described the development process of *Careers 10*: “Because of timelines, we needed two things; we needed Ontario-based people who knew what the curriculum was and were prepared to respond to it, and we needed people who had the time to do it” (personal interview, June 28, 2000). Pearson depended on the authors it chose to formulate the textbook; people who “knew the curriculum”.

The lack of communication between Pearson and the education community in the development process was not off-set by talk between teachers and Pearson's sales force. Pearson had determined not to alter existing marketing plans and involve its sales force, opting instead to rely on telemarketers. As noted above, the efforts of the telemarketers resulted in a single call requesting additional information about the new textbook. Effectively, there was no "talk" in the marketplace and no excitement generated about *Careers 10*. As Mike Czucar had observed: "People didn't really sense Pearson was coming out with a book at all" (personal interview, February 27, 2001).

Item number 6 – Have your book, complete with a cover letter and a small, yet impressive selection of your marketing materials, sent immediately. Make sure to include anything they may need to make a decision.

In early May, Nelson sent out 5000 advance copies of its textbook in a package that included a chart detailing the correlation between the curriculum guidelines and its *Careers Studies 10*, and a Teachers Resource Sampler. Everything needed to assess the Nelson textbook, to start the decision-making process, was available to each school and school board in early May. There were at least four copies of the Nelson textbook sent to each school. The principal and the guidance head each received a copy. This large number made certain that everyone had access to Nelson's new book. Pearson sent out only 1,500 books and, as calls to Pearson requesting more copies attests to, this was an insufficient amount. Sue Cox believed the insufficient number of advance copies was a contributing factor to the low sales of Pearson:

We had a finite number of books to give away. When the decision was being made as to which book to adopt, there were still people who never saw the [Pearson] book. Nelson gave away 5000 books. We gave away

1,500. They blanketed the area. We did not do this and we should have (personal interview, June 30, 2000).

Item number 7 – Establish contact within ten days to two weeks to make sure the packet reached them safely and determine their interest level.

The advance copies of the Nelson textbook had gone out in time to allow for a ten day to two-week review period. Bev Buxton noted that, subsequent to the mail out of the advance copies with marketing material, the sales representatives “were in the schools dealing with the teachers or the guidance counselors, answering questions, promoting the book, and definitely monitoring, if not, influencing their decision” (personal interview, December 15, 2000).

Pearson’s new book was not ready in sufficient time to permit a two-week review period after the mail out. Sue Cox noted that, when she was making presentations in early June of 2000, several teachers commented that they had just received the book in the mail (personal interview, June 28, 2000). Mark Cobham also noted the Pearson textbook had not been sent out early enough to allow for review time:

I think we were asking people to make a decision about a book...within a few days. We were saying, we have a really good book and we want you to buy it and you’ve got about 72 hours to make a decision. It was a bit of a stretch, for our marketplace in particular. Some boards had as much as three weeks but that was rare...most decisions were made within five days of our book coming out, and you have to allow for the courier time as well, so some schools had about 2-3 days with our book (personal interview, June 28, 2000).

Item number 8 - Monitor their interest, answer their objections, follow-up, follow-up, follow-up and Close The Sale!

Both Pearson and Nelson staff gave presentations to teachers and school board members at times setup by the various boards. These presentations provided an

opportunity to monitor interest and follow-up on sales efforts made to date. In the matter of the presentation schedule, Nelson had no advantage over Pearson. But from Nelson's point of view the presentation was an actual follow-up on sales efforts. It was implementation of the final step in the DePalma-Duchinski formula. Nelson had been active in the marketplace from the fall of 1999 forward. At the time of the presentation, Nelson had already sent out the following: the marketing brochure in February 2000; a copy of the textbook with the concurrence statement; and the evaluation copy with more promotional material. The sales representatives at Nelson were also active in the marketplace. Bev Buxton As noted, Nelson's sale staff "sold like crazy in the spring [of 2000]" (personal interview, December 7, 2000). They did close the sale. Over 40,000 copies of the Nelson textbook were purchased.

From Pearson's perspective, the presentations were not an opportunity to follow-up. There was little to follow-up on. Pearson's development efforts had not initiated communication between itself and the education community. The sales representatives at Pearson did not promote the book. The marketing material that was sent was limited; containing scant promotional information about the Pearson textbook. The advanced copies of the textbook went out late and in insufficient numbers to reach all the appropriate people. Simply put, there were few marketing efforts that Pearson could follow up on.

SIX

Conclusion

In *The New Portable MBA* the observation is made that: “In a competitive environment, to deliver a product with superior value requires a company to analyze not only its company activities but also how its activities compare with those of other companies, or players, in the same industry” (Collins & Devanna, 1994, p. 130). Pearson acknowledged this business precept, noting the vanguard position of Nelson in the competition for sale of the career studies textbook:

We thought we had a chance to be second in the market, we never thought we'd come first...we assumed we would be second to Nelson...they had done more marketing than anyone else, we knew they had been out marketing it for sometime, and we hadn't heard much from our other competitors, McGraw Hill or Irwin, so we hoped for a second place showing (personal interview, September 19, 2000).

Cobham and the Pearson team did get their second place finish; they had acceded first place to Nelson because they were entering the market so late in the competition, but Pearson had hoped for a closer margin between the first and second place sales results.

In the interviews conducted with key people at Pearson, all mentioned time as the factor contributing to the problems in the production and promotion of *Careers 10*. Mark Cobham explained the sales results:

Two reasons, one: lateness in the day. We knew we were going to be late, but it turns out boards were making their decisions right about the week that we were coming out, around June 5 or 6 and that was really late, particularly for the Toronto District School Board making their decision. And that board is roughly one third of the Province. Most decisions were

made within five days of our book coming out, and you have to allow for courier time in there as well, so some schools had 2-3 days with our book. I think we were asking people to make a decision about a book they had just seen. We were saying: “We have a really good book and we want you to buy it and you’ve got about 72 hours to make a decision”. It was a bit of a stretch, for our marketplace in particular...So that would be one, but I also think by marketing early and getting people involved in the process you get their awareness. People buy into things and they need time to get their mind around something, you typically don’t buy something this big in just 48 hours... In educational publishing you sell the fact that you know what the curriculum is and you sell the fact that your authors were involved in the curriculum and you allow the customer time to develop a growing understanding of the curriculum and solid authorship has gone into the product. And that takes a number of visits on the part of the sales force and the publisher and workshops and that’s process that builds the confidence in the customers mind that you know what you’re doing and. [It’s] process selling and [it] is very important and we didn’t have that (personal interview, September 19, 2000).

Comments made by Susan Cox, echo those of Cobham:

Pearson’s book was not in the hands of the right people at the right time. Nelson’s book was out three weeks before ours...people had time to get comfortable with it (personal interview, July 19, 2000).

Rob Greenaway opined that the lack of a marketing plan contributed to the less-than-hoped-for second place finish, a plan that was not done “due to timeliness” (personal interview, June 28, 2000). When asked what Pearson could have done to change the results, Mark Cobham stated succinctly: “We should have started this [book development and promotion] earlier” (personal interview, September 19, 2000).

Pearson knew the role Nelson was playing in the competition, they knew and appreciated the need for “process selling”, a term that effectively encapsulates the efforts of Bev Buxton and the team at Nelson, but knew as well they did not have time to implement a comprehensive marketing plan that would reflect process selling. Anita

Borovilos summarized the departure from the standard process followed by Pearson in development and promotion of a textbook:

Typically, if you are going to produce a new book, before you pour a lot of money into it, you start with the market and do a lot of broad-based research, such as surveys, interviews, focus groups and reviews of competing textbooks. This allows you to assemble a product profile and understand what market needs are. In the case of *Careers 10*, because of the timeline, the market research was not done (personal interview, September 16, 2000).

Pearson decided to enter the market, knowing they would finish second to Nelson. The decision to go ahead with *Careers 10* was predicated on a readily achievable break-even. This was the plan and this was accomplished. All personnel at Person readily acceded that, with respect to *Careers 10*, they did not have time to develop a marketing plan and involve the sales representatives, or to research and “process sell” the new textbook. Shortness of time constrained the planning for *Careers 10* to a sole objective: to break-even. This was accomplished. So from that perspective, Person’s publishing proposition for the textbook was accomplished.

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