Copyright Clearance Center

Tip Sheet

6 Practices to Successfully Scale Your OA Program

What publishers need to know about creating optimized, author-first OA workflows.

With dozens of scholarly publishers using RightsLink for Scientific Communications to automate their OA business, we see firsthand the effort involved in creating and managing gold OA workflows that are sustainable and scalable. Below is a set of best practices we have identified in our work with scholarly publishers to help you maximize the value of your OA investment.

1 Prepare Your Team

How prepared is your collective team to fully automate your OA workflows? A lack of cross-functional alignment will slow your progress in meeting customer needs and/or complying with funding mandates. From defining your business model(s) to outlining deal parameters to adopting workflow technology, it's crucial to communicate early and often to ensure everyone is clear and in agreement about the best path forward.

Tip: Revisit your current submission and production workflows as part of an end-to-end mapping of your author experience and see what changes teams may need to make. Give yourself time to implement these changes as you may encounter resistance to changing policy or behavior.

2 Evaluate and Enrich Manuscript Metadata

If the scalability of your OA program is a top priority, you will need to evaluate your current efforts in prioritizing metadata accuracy at your organization. Manuscript metadata drives every aspect of OA automation, from initiating the appropriate workflow to displaying the proper pricing and discounts to matching the manuscript to eligible funding options. While crucial for improved author experience, there are also financial and reputational risks if your agreements are underperforming due to poor-quality metadata.

Tip: Using two or more submission systems? Compare and contrast your configuration settings so that you build a uniform, scalable author experience. Also, evaluate where you are in your journey to collect persistent author affiliations and funder identifiers with every submitted manuscript.

3 Define and Operationalize Your OA Agreements/Workflows

To automate your OA deals, it is important to document your overall program and your deal-specific requirements so that the desired workflows are triggered at the right time for your authors and institutions.

Tip: Consider how and when OA publishing and funding options are communicated to authors for your hybrid journals to make workflows as smooth and as automated as possible. A good system has methods to do this as early as submission.

4 Optimize Your Author Experience

Authors are not experts in OA publishing and are looking for affordable and flexible options when choosing where and how to publish. Automate your waiver/assistance program for authors affiliated with certain countries or institutions to increase engagement, uptake, and the inclusivity of your publishing process.

Additionally, it is possible to remove authors from the funding request process while promoting the availability of funding based on your agreements with their institutions and/or research funders. This “touch-free” workflow is a core feature of the RightsLink platform.

Tip: Your OA workflow platform is just one part of your author’s journey. Reviewing messaging from submission through acceptance and publication to identify gaps is critical to a good author experience.

5 Prepare to Onboard Institutions and Funders

Establishing strong relationships with your institutional and funder partners is key. Consider giving them self-service tools to have as much or as little control over agreement funding requests as possible to drive efficiency and give them an accurate image of the data you’re capturing to help build trust and transparency.

Tip: To ensure funding workflows are designed for all stakeholders, schedule a joint walk-through of the workflow(s) with your most important institutional partners. Adjust author-facing language, notifications, and workflows together.

6 Leverage Your Agreement Funding and Transactional Reports for Data-Driven Decision Making

Use the data from your program to assess what’s working, what’s not, and make adjustments. Shared platforms like RightsLink are built on the premise of secure, standardized data for a unified institutional experience.

Tip: Share agreement funding and transaction data regularly with your sales team to support them in monitoring the status and efficacy of agreements and planning for future negotiations.

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About CCC

A pioneer in voluntary collective licensing, CCC (Copyright Clearance Center) helps organizations integrate, access, and share information through licensing, content, software, and professional services. With expertise in copyright, information management, artificial intelligence, and machine learning, CCC and its subsidiary RightsDirect collaborate with stakeholders to design and deliver innovative information solutions that power decision-making by harnessing information from a wide variety of data sources and content assets.

Learn more

Contact your CCC team to explore how RightsLink for Scientific Communications can help your organization.

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