

## Case Study: **SAGE Publishing**

SAGE Publishing was founded in 1965 to support the sharing of knowledge and educate a global community of scholars, practitioners, researchers, and students. Today, SAGE has offices around the world and is a leading international provider of high-quality academic and professional content, publishing more than 1,000 journals and over 800 new books each year across a wide range of subject areas. The company also offers a growing selection of library products, including archives, data, case studies, and video.

### The Challenge



SAGE was using a highly customized DOS-based system to manage its book products. However, as the publisher grew, it became clear how constraining and inflexible the system was. Making any changes required a dedicated programmer—an inefficient process. Additionally, the system offered limited visibility into royalty statements until final calculations were completed, which frustrated authors who wanted more frequent updates on their publications' performance.

SAGE knew the system struggled to support its growing and increasingly complex product offerings and could not adequately meet authors' needs. As Vince Dimalta, a SAGE Business Analyst, noted:

*"Our previous systems were very localized and supported smaller systems, so we had teams working on royalties in different ways—which means authors got different types of statements, and there were very different processes, which was not efficient."*



## The Solution

SAGE had already implemented Ingenta's author2reader product for its fulfilment services in 2011-12. When exploring solutions for tracking contracts, rights, and royalties more effectively, SAGE's positive experience led them to consult Ingenta again. This time, Ingenta recommended its Folio solution, its content and intellectual property management platform. Folio is a comprehensive yet intuitive system that simplifies managing detailed contracts and their associated rights and royalties.

Dimalta noted that while SAGE was comfortable working with Ingenta, it wasn't the only reason they chose Folio:

*"We liked the extensive functionality on offer. . . . We also liked the fact that we had a complete solution available to us, which could lead to great efficiencies."*

## Consultation and Implementation

Ingenta's decades of experience in publishing products have given them deep insight into how differently publishers operate worldwide. Their approach involves close collaboration with clients to identify specific challenges and configure solutions tailored to their needs. Sarah Smith, Head of Finance and Journals Customer Services Operations at SAGE, shared:

*"I started working closely with Ingenta during the requirements gathering, and I feel their amazing support was definitely one of the reasons the implementation was so successful."*

*"Our dedicated business consultant is extremely knowledgeable and used his vast experience to guide us toward best practices as we embarked on the journey of deciding how to construct our processes... Ingenta really spends time understanding what those needs are and uses that knowledge to support you every step of the way!"*

## The Solution (cont...)

Like all Ingenta products, Folio integrates seamlessly with publishers' existing systems, and Ingenta's team is adept at navigating challenges — even amid ongoing updates. Dimalta added:

*"I am amazed at how patient Ingenta has been with us. From the time we started our implementation, we've made major changes to our fulfilment and product systems, and Ingenta had to work around that. Even with these obstacles, they were able to deliver. Ingenta's attention to detail, fast response times, and continuous dedication to the project were key factors in our success."*

Smith echoed this sentiment:

*"Ingenta went above and beyond the call of duty, always willing to help and stepping in to ensure things ran smoothly. [The consultant] happily made himself available to me during our year-end to patiently guide me through the various reports I would need to calculate our final royalty numbers. This exceptional support led to our first year-end and royalty run being a resounding success!"*



## The Results

Folio provided SAGE with a global system for managing royalties under a single, consistent set of processes—replacing the patchwork of practices previously in use and leading to *“a marked increase in efficiency,”* according to Smith.

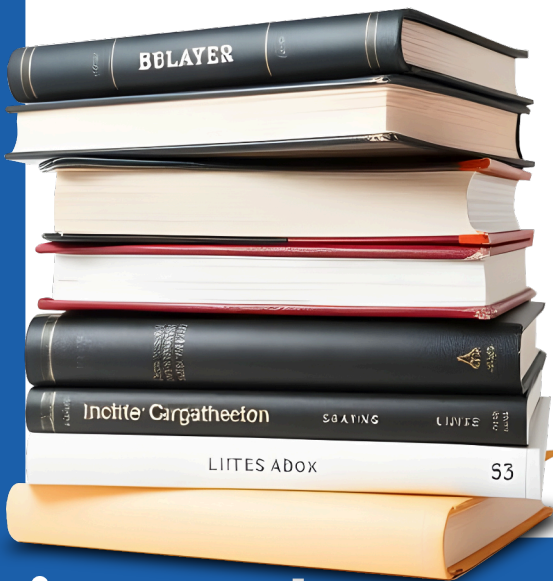
SAGE also shifted royalties processing to a daily and weekly workflow, eliminating the backlog of calculations for each royalty run. This change helped identify potential statement or payment issues earlier.

Smith remarked:

*“I love the visibility I have of our royalty statements—on a daily basis if I should wish to do so. My teams have picked up the system easily, so I would say it is user-friendly and relatively easy to use. We received positive feedback from our authors after our first statement run with the Folio statements—they appreciate the increased transparency we’re now able to provide.”*

Beyond improving author services, Folio boosted productivity by freeing employees to focus on new opportunities and strategic projects.

The benefits to SAGE are clear. As Dimalta concluded:



*“If you need a global, complete solution for contracts, rights, and royalties for the publishing industry, you should seriously consider Folio.”*