BIC Task and Finish Working Group

Project Name: Discoverability and Conversion

BIC Project Brief

The Purpose of the BIC Project Brief

The BIC Project Brief is required to enable necessary projects or pieces of work to progress from being a good BIC Board or Committee idea to a formal request for work that is submitted to the appropriate Task and Finish Working Group and consultant. The BIC Project Brief must be agreed upon and signed off initially by all members of the BIC Committee responsible for the project and then by the dedicated Task & Finish Working Group (if applicable), once established.

The BIC Project Brief should generally be short and provide an overview of the proposed project.

The finalised, signed off document will be made available to all BIC members, who will be able to provide comment or feedback on the intended project.

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BIC Board/ Committee Review

BIC Board/ Committee	Date Submitted
Karina Urquhart	31 July 2025
BIC Metadata Committee	7 August 2025

BIC Board/ Committee Final Approval

Approved by	Date approved
Karina Urquhart	13 August 2025
BIC Metadata Committee	13 August 2025

Document History

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0.1	Draft created	For review	29 July 2025
0.2	Draft updated to reflect Karina's feedback	For review	5 August 2025
0.3	Minor changes to reflect latest feedback from Karina and to align with the Call for Volunteers	For review	7 August 2025
1.0	Further minor changes to reflect Metadata Committee feedback	For publication	18 August 2025

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1.   Purpose

The ultimate purpose of this project is to agree, document and promote the consistent use of ONIX to enable fruitful, efficient product searches and encourage their conversion into sales, through the appropriate use of key metadata elements. Physical and digital products are in scope, as are all readers and all intermediaries in the supply chain. For the purposes of this project, "discoverability" and "conversion" are defined as follows:

a) Discoverability. Enabling a potential customer/reader to find a product and/or information about a product.

b) Conversion. The result of the creation of desire and curiosity, at various times in the supply chain, via easy, trustworthy discovery processes to efficiently enable the connection of known and/or unknown products, with known and/or unknown consumers (both readers and industry intermediaries), platforms and places. Leading to a transaction.

The project will build on the work of BIC's recent Data Recipient Best Practice deliverables. This earlier undertaking sought to address the challenges that the collection and management of large volumes of product information present for both the owners and recipients of that product metadata. The findings from this latest project may inform a potential future Metadata Excellence Award accreditation scheme review.

The project's recommendations will be published with all relevant stakeholders in mind. Namely, those with an interest in making books and related products more discoverable, visible and tradable in the supply chain. Also included are those who are not aware that their books are *not* discoverable or easily and reliably tradable in the supply chain. Stakeholders include standards organisations, publishers, data aggregators, distributors, wholesalers, platforms and resellers, physical as well as online retailers and consumers.

2.   Background

This project will be informed by the work of the BIC Metadata Committee, and specifically the list of challenges that committee members contributed to and subsequently ranked.

There are six challenges in scope for this project (listed in order of priority):

a) Best Practice Basics
b) Metadata Quality Impact
c) Richer Metadata
d) Sources of Information
e) Internet Discoverability
f) Too much information

This new project has been approved by the BIC Board and forms part of BIC's strategic priorities for 2025 – 2026 (Supply Chain Efficiency).

3.   Project Definition

3.1   Project Objectives

By the end of the project, BIC (i.e., the Board and the Metadata Committee) should be presented with a series of recommendations in the form of deliverables, addressing each of the challenges in point 2 above. The deliverables will also include proposals regarding how BIC can share and socialise the project's findings once this timebound piece of work is complete. Given the importance of metadata in the supply chain, on-going advocacy will be a key component of the documentation that will be delivered through the efforts of the Discoverability and Conversion Task and Finish Working Group ("T&FWG") set up for this project. The project will be led by the Project Consultant who will have responsibility for ensuring the project runs and delivers to schedule.

The effort involved is envisaged to be:

a) A maximum 12 days of consultancy between August 2025 and March 2026.
b) Recruiting a Project Consultant (recruited as of July 2025).
c) Ensuring the Project Consultant has a clear understanding of the deliverables and purpose of the project.
d) Meetings via regular online calls. These meetings should be held at least once a month but may vary to reflect the project phase.
e) Regular catch-up sessions between BIC's Executive Director and the Project Consultant.
f) Two reports (long-hand and summary form) to be produced monthly by the Project Consultant for the Board and the Metadata Committee. The long-hand report will be published on the BIC website.
g) A final set of proposals, accompanied by a communication plan.
h) There is minimal impact on the BIC office as the Project Consultant will work remotely.
i) The Project Consultant together with the T&FWG will need to determine how best to manage the project. A series of shorter, concurrent or consecutive deliverables is likely to be the optimum approach.

3.2   Project Scope

The project will focus on the specific challenges captured and ranked by the Metadata Committee. Each challenge can be subdivided into a series of problems, all inter-related. For example, "Metadata Quality Impact" includes references to poor/insufficient data, B2B and B2C customers, reputational impact on retailer, brand or platform as well as lost sales.

The stakeholder types considered in scope include:

a) Standards organisations
b) Publishers
c) Data aggregators
d) Distributors
e) Wholesalers
f) Platforms and resellers
g) Retailers (physical and online)
h) Consumers
i) Service and systems providers

The project will be mindful of the international nature of our industry and the concomitant standards that support it, whilst recognising the needs of our local market. BIC will also aim to reflect the needs of smaller organisations when researching and compiling the project deliverables.

Areas in scope include (this list is not exhaustive):

a) B2B and B2C supply chains in the UK and Island of Ireland (home market).
b) Physical, digital (including e-books, audio, e-audio) and related product with an ISBN or GTIN as the primary identifier.
c) Senders and recipients of metadata.
d) Metadata workflows and visuals.
e) Compliance with the current iteration of ONIX and the associated code lists.
f) Compliance with the current iteration of *Thema*.
g) Existing best practice documentation in support of ONIX and *Thema* standards.
h) The sources of product information.
i) Relevant legislation (such as the EU Accessibility Act).
j) The Metadata Excellence Award accreditation scheme.
k) The Data Recipient Best Practice deliverables.
l) Brands (such as publisher, imprint, contributor, retailer, reseller or platform).
m) Business impact, excluding anything considered company confidential or business sensitive.
n) Artificial Intelligence (such as answer engine optimisation).
o) Search engine optimisation.
p) New media (such as social media, digital publishing and streaming).

Areas out of scope include (this list is not exhaustive):

a) Libraries and library suppliers.
b) Scenarios considered to be unique to a business.
c) Situations considered to be commercially sensitive or of a confidential nature.
d) Legal advice.
e) International requirements. Note Ireland is included above (in scope), as it is considered part of the home market.

3.3 Outline project deliverables and desired outcomes

Key deliverables in summary are:

a) T&FWG members' participation in the project is a demonstration of their organisations' ambition to adopt the project's deliverables within a reasonable timeframe after their publication. This may require collaboration with other metadata stakeholders. "A reasonable timeframe" is to be agreed by the T&FWG where possible. As the project progresses, the T&FWG should regularly review the relevance and applicability of the individual deliverables to their own organisations and reflect on what adoption might look like.
b) Agreement between the Project Consultant and the T&FWG regarding how the project should be broken down into smaller, more manageable

deliverables based on the ranked list of challenges. The final decision on the deliverables for this project will be made by the T&FWG.

c) A project plan to show deadlines for each deliverable with actions and owners clearly assigned. This should be drawn up, shared with the T&FWG and Executive Director, and kept up to date by the Project Consultant.

d) Best practice recommendations for optimising Discoverability and Conversion.

e) Regular progress reports from the Project Consultant to the BIC Executive Director, the Board and the Metadata Committee.

f) Two separate monthly reports, including one for publication on the BIC website.

g) A communication plan and adoption proposal.

h) A review of progress made by all T&FWG members regarding the measurable impact of adoption of the proposals no later than 12 months after their publication.

i) Project closure report to include key findings from the project.

3.4 Constraints

Relevant, accurate and timely product information is key to making products more discoverable and visible to consumers. This is particularly important in a market where technology makes it easier to publish books in multiple formats and keep them in print. Artificial intelligence and new media have a significant role in creating product awareness and influencing purchasing decisions.

The complexity of the project's challenge – to study and report on what steps can be taken to enable efficient discovery and then convert interest in a product into a decision to buy – plus the project's timeframe and the pressures on those individuals that the consultant will need access to, will be constraints.

It is important that the T&FWG participants commit their respective organisations to endorsing and promoting the project's recommendations, as well as increasing awareness of and socialising the project's objectives and outcomes. Adoption of the recommendations is to be encouraged and will underpin a more resilient and business focused supply chain.

3.5 Interfaces

BIC member groups outside the T&FWG will be interested in this project. However, it is the Metadata Committee that is ultimately responsible for the successful delivery of this project. Both the Physical and Digital Supply Chain Committees will also have a keen interest in the execution and success of this project.

The Project Consultant will need to keep in mind the impact of the proposals on the following standards and best practice resources:

a) ONIX 3.1.
b) *Thema* 1.6.
c) BIC New ISBN Best Practice.
d) BIC Acquisitions and Divestments Best Practice.
e) BIC Data Recipient Best Practice.
f) BIC Digital Audiobook Best Practice.
g) BIC Metadata Excellence Award Scheme.
h) BIC Ordering Best Practice.

Outline Business/ Industry case
Please refer to sections 1 (Purpose) and 2 (Background) above.

4. Quality Expectations

It is important that the project deliverables address all areas detailed in the scope above (section 3.2 of this document).

The importance of this project work will be in the following order of priority:

a) Quality.
b) Cost.
c) Time.

Quality is most important because BIC's work must always be of the highest standard. Misinformation or poor recommendations would be detrimental to BIC and its reputation. Cost is the second priority because BIC's budget is important and BIC's resources must be managed. Timeline is the least important: if the project is overrunning slightly, but still within budget and delivering optimum quality, then this is acceptable. The timeline and the budget especially are fixed.

5. Ownership

The Metadata Committee will assume responsibility for this project and will be mandated to make all necessary decisions to ensure the project runs to time and is delivered to a high standard. There is no scope for additional funding over and above what has been agreed in the budget.

6. Acceptance Criteria

The BIC Metadata Committee has responsibility for the final sign off on the recommendations presented by the Project Consultant. The documentation submitted should address all the ranked challenges and should already be signed off by all T&FWG participants. Acceptance of this documentation will close the project, after which the communication and adoption plan outlined alongside the project deliverables will begin.

A meeting of the original project group to review adoption progress made will be called within 12 months of the closure of the project.

7. Risks

Whilst BIC is a neutral organisation, it has a unique position of trust in our industry. It can lead the way with best practice recommendations on discoverability and the conversion of product searches into sales, underpinned by current industry standards. Not doing so risks ignoring feedback from the BIC membership, as well as the wider industry. BIC can enhance its relevance, solve specific industry issues and advocate for the further adoption and development of metadata standards and best practice.

It is possible that the best practice recommendations will have no impact beyond project participants. The Consultant, T&FWG and the BIC Metadata Committee should develop a strategy to promote wider industry implementation to mitigate these adoption risks. This will require ongoing activity from BIC and its members beyond the life of the project. See section 3.3, Outline Project Deliverables and Desired Outcomes.

8.   Outline Project Plan

The Metadata Committee will be asked to sign off this project brief. Agreement on budget has already been given by the BIC Board. The next steps will be:

- **By Thursday 31 July 2025:** Initial review and feedback from the Executive Director.
- **By Wednesday 13 August 2025:** Capture any relevant feedback and obtain project brief sign off from the Metadata Committee.
- **By Friday 15 August 2025:** Capture any relevant feedback and obtain project brief sign off from the Executive Director.
- **From Monday 1 September 2025**: Issue the call for project volunteers and schedule on boarding meetings (where necessary). Use social media to create project awareness.
- **By Friday 19 September 2025:** Complete on boarding meetings and schedule T&FWG1.
- **By Friday 10 October 2025:** Hold T&FWG1 and agree the immediate next steps.
- **October 2025 – March 2026:** The project is underway.

The anticipated end date for the project is March 2026. This is the date by which all the deliverables outlined in Section 3.3 will be achieved.

A more detailed project plan will be put together by the Project Consultant and will be one of their first actions.

9. Budget/ Costs

At the time of writing, the costs to BIC are limited to the agreed Project Consultant's fees. Meeting room costs, staff time and staff travel expenses are not anticipated at this point.

10. Authority Responsible

BIC's Executive Director.

11. Project Consultant

Stephen Long, Independent Book Industry Consultant, has been appointed by BIC's Executive Director.

12. Customers and Users

All BIC member organisations.

13. Reporting

This project reports into the BIC Metadata Committee for the duration of the project. This committee meets online quarterly. The frequency of project update reports to the

Committee will be agreed between the Executive Director and the Project Consultant but is likely to be monthly. This reporting should include, but may not be limited to the following:

    i)   Progress on deliverables vs. the agreed timeline and project plan.
    ii)   Engagement and availability of stakeholders.
    iii)   Potential and actual obstacles to delivering the project on time and in full.
    iv)   Project KPIs, including actuals vs. budget.