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Frank G. Houdek (Chair)  
Southern Illinois University Law Library  
houdek@siu.edu

### Best Practices Subcommittee

Elizabeth A. Edinger (Subcommittee Chair)  
University of California School of Law Library  
eedinger@mail.law.berkeley.edu

Michael J. Bushbaum  
Christine Graesser  
Marian F. Parker  
Betty Lynn Roeske  
Susan Skyzinski

### The CRIV Sheet

Richard Humphrey, Editor (Ex Officio)  
Indiana University School of Law Library  
rhumphre@iupui.edu

Michelle Wu, Co-Editor (Ex Officio)  
George Washington University  
mwu@burns.nlc.gwu.edu

### CRIVPage

Janeen M. Heath, CRIV Webmaster (Ex Officio)  
Baker & McKenzie  
janeen.m.heath@bakernet.com

### CRIV Tools Subcommittee

Rosanne Krikorian (Subcommittee Chair)  
Whittier Law School Library  
rkrikorian@law.whittier.edu

Lori A. Hedstrom  
Marian F. Parker  
Janet Reinke  
Elizabeth Rhodes  
Betty Lynn Roeske

### Mediation Subcommittee

Christine Graesser (Subcommittee Chair)  
Brown Rudnick Freed and Gesmer  
cgraesser@brfg.com

Elizabeth A. Edinger  
Rosanne Krikorian  
Carl Mitchell  
Frosty Owen  
Lorna Tang

### Educational Programming Subcommittee

Michael J. Bushbaum (Subcommittee Chair)  
Valparaiso University School of Law Library  
mike.bushbaum@valpo.edu

Elizabeth A. Edinger  
Christine Graesser  
Lori A. Hedstrom  
Susan Skyzinski

### FTC Guides Revision Subcommittee

Christine Graesser  
Joe K. Stephens

### New Product Award Subcommittee

Frosty Owen (Subcommittee Chair)  
Hunton & Williams  
fowen@hunton.com

Carl Mitchell  
Joe K. Stephens  
Lorna Tang

### Site Visits Subcommittee

Elizabeth Rhodes (Subcommittee Chair)  
University of Baltimore Library  
erhodes@ubmail.ubalt.edu

Frosty Owen  
Janet L. Reinke

# The CRIV Sheet

**Richard Humphrey**  
Indiana University  
School of Law  
Indianapolis, Indiana

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## The Editor's Corner

Hello to all and welcome to another busy year of CRIV activity. As we hope you read in a recent "CRIV Notes" column, the CRIV began this year's activities with meetings and sponsored programs at the AALL Annual Meeting in Washington, D.C. Among other activities was the installation of Michelle Wu as *The CRIV Sheet* co-editor for this year. Michelle served on the CRIV several years ago and we're very happy to welcome her back in a new role. She will serve as co-editor this year (1999-2000) and will continue as editor at the end of my term in July. Needless to say, I'm very pleased that Michelle has agreed to shoulder this task and continue the work that I inherited in 1997. It is certainly to the CRIV's benefit that Michelle brings with her a familiarity with our activities and recent evolution. Welcome back, Michelle.

Frank Houdek, CRIV Chair, makes an impassioned plea for the active participation of our AALL membership. While those of us on the Committee continue to participate in site visits, to mediate complaints, and to advocate with publishers, it is important to remember that much of the CRIV's work depends on the constant vigilance of all our AALL members. Many of the problematic issues that arise in the legal publishing industry are brought to our attention by observant librarians, whose experience and expertise has led them to a keener vision of the ways in which librarians and publishers can work together cooperatively. So please take Frank's message to heart.

Chris Graesser announces the renaming of the Complaint Resolution Subcommittee and provides an insightful piece on constructive responses to price increases, telemarketers, and related matters. Chris continues to monitor reported publisher problems and receives all formally filed complaints. Her subcommittee is always available as a last resort if negotiations with an individual company reach a stage where resolution seems improbable.

Betty Roeske and Lorna Tang report on the Private Law Librarians Technical Services Roundtable with LEXIS Publishing, which was held during the AALL Annual Meeting in Washington. This roundtable further demonstrates the value of getting specific library staff member groups to sit down with publisher representatives and discuss issues that have direct impact on the daily duties of law librarians. Although similar discussions are often instigated by the CRIV itself, individual librarian groups

can bring a more detailed perception of the issues at stake and can provide more substantive solutions.

Lorna Tang also provides us with a report on the recent visit to CCH Publishing by law librarians from the Chicago area. This local group spent the morning touring CCH's Peterson Avenue facility and getting a firsthand look at the company's operations. Most of the tour focused on aspects of the customer service division and demonstrations of how CCH carries out its quality assurance program.

Two new CRIV Tools are also included in this issue. "Getting Results from Customer Service" was drafted by the CRIV Tools subcommittee, chaired by Rosanne Krikorian. "Checklist for the Negotiation of Internet Subscriptions," authored by Jean O'Grady, is reprinted by permission from *PLL Perspectives* (Spring 1999). The CRIV will continue to publish print versions of CRIV Tools in this form to supplement their availability on CRIVPage, for the particular benefit of those law libraries which may have limited access to Internet sources.

Rob Richards furnishes a timely update of recent legal publishing industry news. Much of the information Rob provides is forwarded to him by law librarians throughout the country. Yet another example of the benefit we all receive from the involvement of a few observant colleagues.

Cindy Spohr, Director of LEXIS Publishing's Librarian Relations Group, announces the creation of a Librarian Panel that will be advising the company on decision-making over the next year. The primary focus of this panel will be technical services. The selection of librarians to serve on this panel was a joint effort between the CRIV and LEXIS Publishing.

I hope you will find something of interest in this *The CRIV Sheet* issue. As always, if there are concerns you would like to see addressed or if you want to know more about particular activities of the Committee, please don't hesitate to contact me, Frank Houdek, or one of the other members. It is our goal to serve you, our members, and to continue to foster cooperative working relationships between law librarians and the legal publishing industry. We need your continued help and support to fulfil this task. And, if you've been looking for a forum for your writing skills, Michelle and I are always anxious to find new article contributors. Happy Reading!

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**Michelle Wu**  
George Washington  
University  
Washington, D.C.

## Co-Editor's Corner

When Richard Humphrey approached me in April about rejoining the CRIV, this time as co-editor of *The CRIV Sheet*, my first thought was "Here I go ... back into the fray!" Fortunately, it is a friendly and familiar fray. Having viewed from afar the impressive, not to mention rapid, evolution of the Committee in the past two years, I was pleased to become a part of this industrious and ambitious group.

I last worked with the CRIV a couple of years ago, before the advent of CRIVGrams or the CRIVPage. Site visits had been reintroduced, and the CRIV was beginning its metamorphosis into the Committee it is today. Even though much of the CRIV has changed since that time, the precepts I learned during my two years with the Committee remain with me, the most important of which is that the relationships between law libraries and vendors

require constant attention and care. The CRIV and its various services, including *The CRIV Sheet*, serve to improve and solidify these relationships.

As co-editor of *The CRIV Sheet*, I hope to follow Richard's lead by continuing to provide the membership with tools and

information toward this end. Also, as all editors have in the past, I will persevere in inviting, cajoling, and otherwise encouraging writers to contribute to *The CRIV Sheet*. I look forward to a productive term with the Committee!

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## From the Chair

### We Need You!

AALL has assigned much of the responsibility for helping law librarians to meet the challenges wrought by changes in the legal publishing industry to its Committee on Relations with Information Vendors (CRIV). If the compliments that I heard at the Annual Meeting in Washington, D.C., this summer are any indication, many of you think that the CRIV made great strides toward fulfilling that responsibility in 1998–1999.

For instance, I heard praise for the development and use of CRIVGrams as an effective and timely communication tool. (This particularly important step for the CRIV was due primarily to the tireless efforts of Chris Graesser.) I also heard that the enhancement of CRIVPage, our content-rich Web site developed and maintained with singular devotion and care by Webmaster Janeen Heath, provided you with valuable assistance on a daily basis. (The truth of this is borne out by the nearly 2000 hits per month that CRIVPage receives; some of the most popular parts are the "Sample Letters to Vendors" and the "Vendor Grids.")

Another activity of the CRIV that garnered its share of your attention in the past year was the creation of CRIV Tools, practical resources designed to assist librarians in their day-to-day interactions with the legal publishing world. Chaired then and now by Rosanne Krikorian, the subcommittee assigned to this task went from an amorphous concept to an impressive list of polished products in the course of the year, producing such tools as "Sample Letters to Law Library Vendors," "Vendor Contact Information," "Sample Publisher Log," "Y2K Compliance Statements," and "Dealing with Telemarketers." All of these tools were made available in electronic form on CRIVPage and some were also distributed in print form through *The CRIV Sheet*. The subcommittee is off to a fast start this year, with its latest tool, "Getting Results from Customer Service," simultaneously distributed in this issue of *The CRIV Sheet* and on CRIVPage. And more is in the offing with a list of divested products (where they came from, where they went) scheduled for release within the next few months.

Finally, I was especially pleased to hear that our efforts to facilitate a productive relationship between librarians and publishers—not just through improved communications and tangible aids but also with one-on-one assistance and mediation

efforts to resolve specific problems—met with your approval. Chris Graesser and her mediation subcommittee handle much of this work, of course, but the CRIV's site visits to publishers, involving all Committee members, are equally important in establishing contacts and exploring issues *before* they become problems. Betty Roeske's report on the PLL Technical Services Roundtable with LEXIS Publishing in Washington, D.C., presented in this issue, is a prime example of the benefits of this approach. This focused exploration of the branding issues that emerged with the consolidation of several companies under the LEXIS Publishing banner grew out of a spirited discussion that took place during the CRIV's visit to LEXIS-NEXIS in Spring 1999. And now, under the leadership of Betty and Lorna Tang, the effort has led to the creation of a LEXIS Publishing Librarian Panel, also described elsewhere, that will work diligently in the coming months on behalf of all AALL members to ensure that librarian views in this area are given due consideration.

I could continue to list the things that members told me they liked about the CRIV's effort in the past year, but that would obscure my only reason for writing. For while it's nice to think that you're "responsible" for good things happening, the truth is that we on the CRIV are only a small part of this effort. Yes, the CRIV worked hard to meet its charge in 1998–99; each member made substantial contributions in many areas (only a few of which I listed above). Nevertheless, it is important for you to know (and us to remember) that the CRIV's effectiveness is largely dependent on the active participation of librarians and publishers alike. The CRIV has developed the mechanisms to share information and resources, but much of the actual content must come from people in the field. We were fortunate to have such participation in the past year and therefore we achieved some successes. However, the only way that we can duplicate those achievements is with the continued involvement of every member of AALL. Use the suggestion/comment box on CRIVPage to communicate directly with the CRIV. Respond to our electronic surveys. Think about writing for *The CRIV Sheet* or contributing a "CRIV Notes" column in *AALL Spectrum* (contact editor extraordinaire Richard Humphrey if this interests you). These are just a few of the ways you can help the CRIV do its job. Because the bottom line is simple; we can't do it without you. *We need you!*

**Frank Houdek**

Southern Illinois  
University Law Library  
Carbondale, Illinois

Chris Graesser

Mediation  
Subcommittee Chair  
Brown Rudnick  
Freed & Gresmer  
Hartford, Connecticut

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## Complaint Resolution Subcommittee Renamed

The CRIV has decided to rename the *Complaint Resolution Subcommittee* the *Mediation Subcommittee*. The Committee feels that *complaint* is too strident a term and that *mediation* more accurately reflects the ongoing mission of this subcommittee. The Mediation Subcommittee will carry on with its current activities, namely, to monitor problems with publishers as posted on law-lib and the other law library listservs and, whenever possible, get information that will be helpful in effecting solutions to these problems.

CRIVGrams will continue to be posted whenever we feel information needs to be disseminated to the AALL membership.

When appropriate, we will also post brief announcements on behalf of publishers, if these announcements contain information that will be helpful to our members in performing their daily duties. As always, the Mediation Subcommittee tries to avoid any language that might be interpreted as promotional and strives to convey the message that the CRIV does not endorse any publisher or its products. We welcome all constructive feedback on CRIVGrams. The Mediation Subcommittee will also continue to act on formal complaints that are filed. Formal complaint forms are available at our CRIVPage Web site (<http://www.aallnet.org/committee/criv/>).

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Chris Graesser

Brown Rudnick  
Freed & Gresmer  
Hartford, Connecticut

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## Responding to Price Increases, Telemarketers, and Other Annoying Facts of Life

If comments on law-lib are any indication, this year has seen no improvement in the price inflation of subscriptions for legal publications. If the price of the subscriptions themselves haven't increased, the shipping costs have. And the fact that telemarketers continue to plague us will come as no surprise to anyone.

What can law librarians do? We can become more savvy consumers and managers.

### Increases in Subscription Costs

Do not assume that you have to maintain every title in your library. This is especially true of treatises with annual supplements. Look closely at the additions in the supplements. Most publishers will provide a synopsis of the supplement; if they don't, you should be immediately suspicious. Are there significant additions to the analytical text, or merely case law and legislative amendments for the past year? If it is the latter, anyone can get that kind of information by cite checking online, which they would have to do anyway to be really current.

Check with the attorneys and other patrons who are most likely to use the book. The circulation records may help if you have no idea who uses the material. Have they taken it off the shelf recently? Is it worth the money to keep it current?

This doesn't have to be a big procedure. If your organization has e-mail, you can send a quick note to interested parties and just wait for responses. If you get no response, send the message to a larger group or be really bold and make the decision yourself. Just document the process so you will have backup when some irate senior partner comes roaring into your office two years down the road. And keep track of the savings achieved through cancellations.

Certain publishers issue quarterly cumulative looseleaf supplements, at double the price of a single annual supplement. How do you get around that? Try the old tried and true "write

for order" protocol; namely, cancel your subscription and pick it up again one or two years down the road.

Do you need to mark the book "not current?" That's up to you, but I don't. If the title is a treatise, people will be scared off from using it, even if the text is still valid. If the title is a looseleaf service that used to be updated regularly, it should be removed from the shelf when cancelled, since the primary purpose of the publication is current awareness. I always tell patrons to assume nothing is absolutely current, supplemented or not.

### Telemarketers

Now, as for those telemarketers, they're not going away. Clearly this marketing technique is working for publishers. It is up to the library manager to thwart their efforts. Designate one person to approve orders (as opposed to placing orders, which could be handled by more than one). Make sure every library staff member (not to mention the rest of the organization) understands that the acquisitions librarian must approve all orders charged to the library budget in writing. Keep a record of all purchase orders and check all shipments against the purchase orders. This seems like common sense, but I have seen enough complaints to know that not all librarians are doing this.

A few law-libbers have commented that they don't want to be mean to telemarketers, so they suffer through the reading of the script before saying "no." Time to concoct a script of your own and cut them off at the pass. Instruct your staff (yourself, if you're a solo) in something like the following response to a telephone solicitation: "I'm sorry, but our firm does not allow the ordering of books through telephone solicitation. If you would like to send us a brochure, we'd be glad to look at it. If we're interested, we'll contact our local rep." Don't be afraid to interrupt. This is not cruel; you are actually saving them time as well.

Sooner or later, some enterprising telemarketer with a quota to fill will go ahead and ship something to you without

authorization. This is where your purchase order record should come in handy. But not all shipments are labeled so you can tell what's inside, which means you can't return to sender. I usually send a form letter informing the publisher that the shipment was unsolicited and they can have it back if they send a postage-paid label. (See the CRIV Tools section of CRIVPage, on our Web site). Nine times out of ten, this works. Some publishers, such as West Group, will do this over the phone, and even send extra labels.

If you return at your own expense, send it by a traceable shipping service (not book rate), unless you are prepared to

swallow the cost of the item if it gets lost. Keep a publishers' log for future reference. (See CRIV Tools.)

### **Do I Really Need to Do This?**

All of this may sound like a lot of work, but once it gets to be a routine, it can be done without batting an eye. The goal here is to deal with these issues in a professional manner without spending too much time or getting too stressed. Ultimately, you should save time and money, and hopefully, publishers will find that imposing unreasonable costs and obnoxious marketing techniques does not pay.

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## **PLL Technical Services Roundtable with LEXIS Publishing**

The purpose of this July 19, 1999, meeting (held at the AALL Annual Meeting in Washington, D.C.) was to inform technical services librarians of the recent announcement of the formation of LEXIS Publishing. The LEXIS representatives at the meeting were Janet Collins (Acting Vice President, LEXIS Publishing Marketing), Cindy Spohr (Director, Librarian Relations Group at LEXIS Publishing), and Michael Latsko (Director of Jurisdictional Publishing Operations for LEXIS Publishing). The meeting was monitored by Betty Roeske, Chair of the PLL-TS Group.

Janet Collins reported that five Reed Elsevier companies have been brought together under the LEXIS Publishing umbrella brand. The names of these five companies will continue to appear under their new logo for a brief period of time in order to help librarians become familiar with the changes. The names of these five companies are:

LEXIS-NEXIS—online research

Martindale-Hubbell—directory

Matthew Bender—treatises

Michie—codes

Shepard's—citations

LEXIS Publishing has extensive plans to communicate with librarians on the changes that will be taking place as the result of integrating these companies under the umbrella brand.

The new *lexis.com* research system was demonstrated in the LEXIS Publishing booth in the exhibit hall at the convention, and LEXIS hopes it will become legal information users' preferred service.

Cindy Spohr reported on the CRIV site visit at the LEXIS-NEXIS Group headquarters in March of this year. High-level LEXIS executives met with the members of the CRIV to discuss a variety of topics raised by the CRIV and by the AALL membership. The executives and CRIV members were divided into two groups, one for online and the other for off-line products. Spohr also reported that Ann Fullenkamp (Senior Vice President for Strategic Marketing at LEXIS Publishing) met with

academic and firm technical services librarians in Chicago on May 5 to seek their input on upcoming company changes.

At present, LEXIS Publishing is planning to create a special panel of Technical Services Librarians to serve as a sounding board for branding strategies which will have an impact on technical services procedures. (Official announcement of this panel's duties and its appointees appears elsewhere in this issue of *The CRIV Sheet*.)

Michael Latsko (LEXIS Publishing, Charlottesville, Virginia) reported that teams are being formed to implement branding strategies. Teams include staff from the five companies and, in some cases, LEXIS Publishing legal counsel staff. A product packaging team was recently formed to address issues on hardcopy and CD-ROM publications. Since the impact of product packaging is of specific interest to technical services librarians, it is envisioned that this team will work closely with the special panel of librarians.

The overview presentation was followed by a topical discussion session as discussed below.

### **Communication**

At LEXIS Publishing, Cindy Spohr is in charge of developing a communication plan for librarians. Do we want weekly communication? Is communication through the CRIV a desired possibility? Librarians at the meeting asked to have new product notices specially prepared for and distributed to technical service librarians, and to have notice or instruction for changes sent along with the piece.

### **Customer Service**

Additional customer service staff training for the hardcopy and CD-ROM publications will begin soon at LEXIS Publishing. Current plans include merging the customer service departments of Matthew Bender and Michie within the next 18 to 24 months.

### **Foreign Imprints**

No foreign imprint is involved in the formation of LEXIS Publishing.

*Lorna Tang*

*University of Chicago  
Chicago, Illinois*

*Betty Roeske*

*Katten Muchen & Zavis  
Chicago, Illinois*

## Invoices

The Matthew Bender and Shepard's invoices are already created by the same system. LEXIS Publishing is planning to make changes to the invoicing system for Michie in order to provide a consistent look and consistent policies for the Shepard's, Matthew Bender and Michie invoices. The company is not planning to merge accounts into one giant invoice. Customers will continue to receive three invoices, one from each company. At some point next year the invoices from the three companies will look the same. The Shepard's and Matthew Bender invoices will maintain the same account numbers that customers have today. Because of system constraints, the Michie account numbers may not be completely identical. LEXIS Publishing will provide information to customers on how the account numbers change (i.e., a formula) so that they easily understand what has changed. In 18 to 24 months, the company will have the capability to merge the three accounts, but will do so only at the specific request of the customer. LEXIS Publishing will not automatically merge the three accounts into one.

At this time, LEXIS Publishing has no plans to merge the online LEXIS-NEXIS invoices with the Shepard's, Matthew Bender, and Michie invoices.

The pros and cons of annual invoicing were discussed at the meeting. It seemed that librarians all work for different parent organizations and have different wishes and restrictions. A few librarians asked LEXIS not to put invoices in plastic wrappers.

## Name Changes

Shepard's and Martindale-Hubbell are special names. Imprint change is being considered by LEXIS Publishing. Librarians prefer to see title change happening with a new edition. For looseleaf publications, it is acceptable to librarians that the title on the title page change without receiving a new replacement binder.

## Pricing

Librarians like to see advance notices for new prices. Some libraries cannot afford the new higher price and prefer to cancel the title before receiving any new piece.

*Lorna Tang*

*University of Chicago  
Chicago, Illinois*

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## Chicago Area Law Librarians Visit CCH

In August, CCH Incorporated invited law librarians in the Chicago area to take a first-hand tour of its Customer Service Center and Print on Demand facilities at a special session in Chicago.

On Monday, September 27, 1999, at nine in the morning, the law librarians boarded CCH's charter bus in downtown Chicago. Forty minutes later we arrived at the CCH building at 4025 W. Peterson Ave. in Chicago. This building houses the Order, the Customer Service, the Print On Demand, and the Fulfillment Departments only.

The visit for the 23 academic and firm law librarians began with an informative session conducted by Jerry Pruitt (CCH Vice President for Customer Service & Operations), Mike Swiney (Head of Customer Service, Product Support), and John Barrett (Head of Print on Demand operations). Also introduced were Barbara Johnson (Customer Service, Account Administration Manager) and Leslie Bonacum (CCH Librarian Liaison). Bonacum is the most important contact for librarians, as she will always know where and to whom to direct library complaints. However, Swiney and Johnson emphasized that they also want to be notified when librarians have difficulties in resolving billing or other problems through CCH customer service staff. Contact them directly at:

Barbara A. Johnson  
Manager, Account Administration  
CCH Incorporated  
4025 W. Peterson Ave.  
Chicago, Illinois 60646-6085  
773/866-3152  
barbara\_johnson@cch.com

Mike Swiney  
Head of Product Support, Customer Service  
CCH Incorporated  
4025 W. Peterson Ave.  
Chicago, Illinois 60646-6085  
773/866-3125  
swineym@cch.com

Leslie M. Bonacum  
CCH Librarian Liaison  
CCH Incorporated  
Riverwoods, Illinois 60015  
847/267-7153  
bonacuml@cch.com

The morning session highlighted "the process, people and technology involved from the very beginning of a customer request, through order fulfillment using CCH's innovative Print on Demand technology." After the session, the librarians were divided into two groups to tour the Customer Service and the Print on Demand facilities.

Customer service occupies a large part of the Peterson facility. Representatives are grouped in teams, and subject specialties are established to better serve customers' special needs. Printed products are readily available for reference purposes. Management emphasizes continual training for the customer service representatives. Through the expansion of internal career paths, CCH has also reduced staff turnover.

Management stressed the importance of giving complete, accurate, and quality answers, not just answering numerous phone calls. Statistics are posted in the work area to let staff

know how a team performs. Management has worked to ensure that CCH customers generally speak to a customer service representative immediately, but if a customer does have to wait, the wait time is brief. At present, the customer service staff can accept only monographic orders. Standing orders are processed by the Order Department.

The tour of the Print on Demand facility was quite impressive. This printing system is so innovative that other publishers have sent their representatives from around the world to see how it works. CCH's capability to do print-on-demand has eliminated the need to manually "compile" volumes for each new order. CCH also does not need large warehouse space to store printed looseleaf pages, and saves paper by printing only the necessary pages. The highly efficient state-of-the-art high-speed digital printing system can print, cut, and sort new copies as new orders are received. Volumes are usually ready for delivery within 48 hours of receiving the order.

The Fulfillment Center staff gathers the printed pages into binders, attaches proper spine information, and then prepares them for shipping. Again, the whole process seems very efficient.

Throughout the tour, we saw how CCH handles quality assurance. It tests its CD product on a variety of computer hardware units. It also prints and files a copy of the new looseleaf update before the updates are printed for customers. These procedures allow CCH to catch looseleaf or CD errors before a product is released to libraries.

When the two groups reconvened, the CCH staff demonstrated its automated telephone system at 800/525-3335. CCH encouraged us to use this phone system to request duplicate invoice, tracking payment, etc. It also demonstrated the interactive online service (<http://support.cch.com/>) for ordering missing pages and reports. CCH hopes that these new communication alternatives will provide customers with easy, accessible support, and it plans to continue to involve AALL members as it develops and tests new customer services. Mike said that staff will always welcome our phone calls if we prefer to telephone.

After lunch, the librarians rode the bus back to downtown Chicago. We arrived there shortly before 2:00 p.m. and went back to our jobs.

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## CRIV Tool

### Getting Results from Customer Service

*The following guide to achieving a successful outcome in working with the customer service representatives of a legal publisher was developed by the Tools Subcommittee of the CRIV from suggestions contributed by law librarians and legal information publishers.*

**1. When problems occur, don't delay in dealing with them.** Tackle those erroneous charges as soon as they appear on an invoice or statement; deal with that unordered item as soon as it arrives in the mail; claim that missing supplement as soon as its absence is noted. These occurrences don't go away by themselves. On the contrary, they multiply and become compounded.

**2. Participate in discussions on law-lib and similar electronic discussion lists.** Find out if others have had the same problem and whether they have been able to solve it.

**3. Identify the person in the vendor's organization who can solve your problem.** When you have tried, over a reasonable period of time but have been unsuccessful in having a problem solved by customer service representatives, contact the Customer Service Manager.

- If you are dealing with a publisher who has assigned a special customer service representative to your account, your category of library (academic, government, etc.), or your geographic region, be sure to deal only with that representative and build an effective working relationship with that person.

- When you want to have an invoice canceled or modified, contact the Credit/Accounts Receivable Department. For especially difficult problems, contact the Credit Department Manager.
- If you have an ongoing relationship with a sales representative who is effective at handling problems that arise after the initial sale is made, contact that representative for major or stubborn problems, but not necessarily for every small one that arises.
- When you are having problems with your local sales representative, contact the Sales Manager for the company or the Regional Sales Manager for your area.
- If you have trouble identifying the proper person to contact, you can:
  - a. Ask your local sales representative. He or she may be able to identify a reliable and experienced customer service representative who can help you get results. This approach may be more effective than trying to get your sales representative to actually handle the problem for you.
  - b. Contact the vendor's Librarian Liaison, if there is one. Many publishers have created positions specifically responsible for working with librarians.
  - c. Check the publisher's Web site, catalog, customer service pamphlet, business cards, etc., for the names of department managers.

- d. Consult CRIV Tool: Vendor Contact Information Grids (on CRIVPage at <http://www.aallnet.org/committee/criv/vendor.htm/>) for phone numbers and addresses of many departments within major legal publishing companies.
  - e. Request assistance from CRIV's Mediation Subcommittee. (Contact information for the subcommittee is available on CRIVPage at [http://www.aallnet.org/committee/criv/.](http://www.aallnet.org/committee/criv/)) The subcommittee can often facilitate contact between librarians and appropriate staff members of legal publishers.
- Once you find someone knowledgeable within the vendor's organization, stick with that person, at least until the particular problem at hand is resolved. Find out his or her phone extension and address (e-mail and street address). Address all future correspondence and telephone calls to that person. If you are going to mail a check which needs to be applied a certain way to certain invoices, ask whether you can mail the check to this particular person to make sure the payment is applied the way you've both agreed that it should be applied.

**4. Have all the information needed to solve a problem at hand before you contact a customer service representative**, whether by phone or mail. Provide all relevant information accurately in written correspondence. Examples of "must have" information when communicating with a vendor: account number; invoice number and date; check number and date (and cancellation date if you have a cancelled check); names of people or departments contacted earlier, date of contact, what was promised to be done, and date by which it was to be completed; accurate publication titles and volume or release numbers. To facilitate documentation and accessibility to this type of information, consult CRIV Tool: Sample Publisher Log located on CRIVPage (<http://www.aallnet.org/committee/criv/publog.htm>)

When using written correspondence, be sure you send your letter to the correct address. For example, do not send correspondence concerning a problem to the vendor's payment receipt address. Carboncopy all interested parties within the vendor's organization. For assistance in preparing correspondence, consult CRIV Tool: Sample Letters to Law Library Vendors (on CRIVPage at <http://www.aallnet.org/committee/criv/smpllrs.htm>).

**5. Keep copies of all correspondence** regarding a problem, including e-mail messages and your notes of telephone conversations.

- Until the problem is finally resolved, keep all relevant documents in a file close at hand. Don't file them in your general file for that publisher. This way, if you receive a phone call from the vendor, you will be able to quickly discuss the matter. Also, because the file is

within your view on a daily basis, you won't forget that the problem is still unresolved.

- Especially in the case of complicated problems that have defied solution over a period of time, when you finally reach someone who understands the problem and seems able to resolve it, consider asking for written confirmation of the solution. In case the problem crops up again, you won't have to start from scratch in trying to get it solved again.

**6. Give the publisher time to correct the problem.** If you are speaking to a customer service representative on the phone, ask how the problem will be solved and how long it will take to solve the problem (e.g., "Should I call you back if I still see the charge on my April statement?"). If you are writing a letter or sending an e-mail, tell the representative that you will take a certain course of action "if we do not hear from you within x number of days." Give the publisher a reasonable amount of time to investigate the matter, think things over, and provide you with a helpful response.

**7. It is okay to be firm and persistent, but also remain polite and keep an objective tone.** You have every right to tell the customer service representative that the company's mishandling of your account, order, or problem has caused you a great deal of lost time and aggravation that will lead you to rethink future purchases from the publisher. However, you should retain your composure and professionalism at all times, no matter how exasperated you may be.

**8. Prevent problems before they occur.** Then you can ignore the seven suggestions listed above.

- As a general practice, maintain your accounts in good order. Pay invoices on time.
- In the case of returned items, be sure to include a copy of the invoice with the item. On the invoice or in a letter attached to the invoice, state the reason for the return. Also, tell the vendor what you want the vendor to do (e.g., cancel the invoice and the subscription; cancel this particular invoice but maintain the subscription). Send a copy of the invoice and your instructions to the Customer Service Department just in case the Returns Department does not forward your message through proper channels.
- When you are claiming items you have not received but should have, make it clear that you are not ordering a second copy of an item, but rather that you are claiming an item already on order.
- Participate in surveys and otherwise provide publishers with suggestions as to how they can provide better service to their customers. For example, if you attend the Annual Meeting, make a point of visiting the Exhibit Hall to talk with publishers about your experience working with their customer service representatives and departments.

## Checklist for the Negotiation of Internet Subscriptions

Many of us who survived the negotiation and networking of CD-ROMs looked hopefully to the next wave of digital products for a simpler desktop solution. Now that we have Web site subscriptions, our lives should get a lot easier, right? Wrong! I have listed below a sampling of issues that should be addressed in the negotiation of Internet subscriptions from legal and law related publishers.

**Ask to see the license agreement.** Some vendors will provide an order form for the product without providing full disclosure about the underlying rights and responsibilities of each party.

**Most license agreements are one-sided,** providing all of the protections to the vendor and putting all the liability on the purchaser. For example, most of the agreements I have seen do not acknowledge that the vendor has an obligation to the purchaser if the Web site or some of the data becomes unavailable for a prolonged period of time. Negotiate for a reduction in price or an extension of the contract to compensate for the lost access.

**Who controls the Web site?** If the vendor does not have direct control of the Web site or the data, you will find yourself in endless rounds of finger pointing and triangulation.

**Who is responsible for notifying you** if the Web site becomes unavailable? According to most contracts, no one. Usually you find this out when you start getting a series of calls from frustrated researchers. Although no vendor has trouble finding you if you have an invoice that is past due, vendors have not yet recognized that the digital tools they are using could be used to improve customer service. If a Web site goes down or a critical update does not get loaded on the Web site, vendors could disseminate important "alerts" for you to pass on to your users.

**Password management.** If you are negotiating a site license, you need to determine if you will be required to manage individual passwords for every possible user. Some vendors will allow access to anyone from your organization by validating the address of your server. Others will still require a password and still others will require that you establish a second password for those wanting to access the site from home or while traveling. You will need to determine whether you will be charged additional fees for adding these "off-site" passwords.

**Cancellation.** While most vendors allow you to cancel at the end of the term by simply opting not to pay the renewal invoice, others require advance notice of intent to cancel. One vendor's contract renews automatically in annual increments unless you affirmatively cancel the contract in writing within a

30-day window before the renewal date. Other contracts can be cancelled at will by the vendor if it believes someone at your organization has violated the license. Such clauses may also call for the forfeiture of any prepayments you may have made for the balance of the contract term.

**Usage statistics.** So far, I have not encountered one vendor who was prepared to provide me with a report on the volume of usage. If there are several subscriptions at the Web site, it would be helpful to have the "hits" broken down for each title subscribed to. This will be particularly helpful when it is time to renew the license. I was recently able to negotiate a favorable rate for an Internet license by showing a historical report on the usage pattern for the comparable CD-ROM product that was on our LAN. It may be possible for your network staff to generate some reports that will be helpful in understanding the volume of usage of particular sites.

**Authorized users.** Make sure the contract is not unnecessarily restrictive. You need to decide who needs to be included in the definition of an "authorized user." If you negotiate a contract for a practice group of 30 lawyers, you need to account for access by non-lawyer support staff who may need to be able to retrieve documents on behalf of the attorneys.

**Desktop software.** Will use of the Web site require the installation and ongoing maintenance of desktop software in order to provide the end user with full functionality? It is not uncommon for the vendor of a Web site to expect you to install proprietary software requiring ongoing maintenance throughout the organization. Is that software Y2K compliant and will it function properly on your current desktop and LAN environment?

**Content.** Have the vendor clarify how the content or functionality of the Web site compares with the print, CD-ROM, or dial-up you have purchased in the past. If all the data are not included, negotiate for a price reduction or the continuation of a substitute product for free.

**Can you cancel other products?** Make sure the price quote is not contingent on your continued subscription to other related products. Vendors are still trying to protect their subscriber base for existing products by slipping in clauses that commit you to continue your existing print subscriptions.

**Will your users adapt?** Sometimes end users are resistant to change and may want to stick with an old product with a familiar interface. Request test passwords that will allow the end users to try the product before you sign the contract.

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Rob Richards

University of Colorado  
Law Library  
Boulder, CO

## Industry News

QL Systems Limited (QUICKLAW) announced on October 6, 1999, that it would acquire Irwin Law, a Toronto legal publisher. Please see the announcement at: <http://www3.quicklaw.com/cgi-bin/announcedoc.pl?DOCNO=314>.

On September 30, 1999, QL Systems Limited (QUICKLAW) announced that it had agreed to acquire Current Legal Resources Inc. See the announcement at <http://www3.quicklaw.com/cgi-bin/announcedoc.pl?DOCNO=310>. Thanks to Chris Graesser and Frank Houdek for this news.

Taylor & Francis Group has recently acquired Europa Publications, and intends to acquire the International Journals Division of Scandinavian University Press, according to Library Journal Academic Newswire, September 30, 1999.

Bell & Howell Information and Learning—formerly UMI—announced on September 29, 1999 that it had acquired the Chadwyck-Healey Group, the UK publisher. Please see the announcement at: <http://www.umi.com/hp/PressRel/990929.html>.

On September 16, 1999, RoweCom, the subscription agent, announced that it would acquire Dawson Information Services Group, the owners of Faxon, a leading academic subscription agent. Please see the announcement at: [http://www.rowecom.com/news/pr990916\\_dawson.asp](http://www.rowecom.com/news/pr990916_dawson.asp). Thanks to Eleanor Cook for this news.

During August 1999, Gale Group acquired Documents Index, the publisher of *Andriot's Guide to U.S. Government Publications*. Thanks to Barbie Selby for this news.

On August 26, 1999, QL Systems Limited (QUICKLAW) and Current Legal Resources Inc. announced a joint agreement in which CLR would provide U.S. legal material for the QUICKLAW

service. Please see the press release at: <http://www3.quicklaw.com/cgi-bin/newsdoc.pl?DOCNO=306>. Thanks to Margie Axtmann for this news.

In August 1999, LEXIS-NEXIS Group announced the formation of LEXIS Publishing, which includes the following "brands" of legal information products and services:

LEXIS-NEXIS—computerized legal research  
Shepard's—citators  
Matthew Bender—analytical services  
Michie—annotated statutes  
Martindale-Hubbell—directory of lawyers  
and law firms

Thanks to the Committee on Relations with Information Vendors of the American Association of Law Libraries for this information.

In the July/August 1999 issue of *Legal Information Alert*, Donna Tuke Heroy reported in the "For Your Information Column" the following publications mergers:

LawStuff, Inc., operator of the [lawstuffusa.com](http://lawstuffusa.com) website, has merged with [law.com](http://law.com). Both are now owned by American Lawyer Media, Inc.

The newsletter *legal.online*, formerly published by Legal Communications, Ltd., has been acquired by Leader Publications, and merged with *The Internet Newsletter*.

The Daily Record Co., a subsidiary of Dolan Media, has acquired *The Internet Lawyer* magazine.

Glasser Legal Works has acquired *The Internet Connection: Your Guide to Government Resources* from Bernan Associates.

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## New Librarian Panel Established by LEXIS Publishing

**Cindy Spohr**

Director, Librarian  
Relations Group  
LEXIS Publishing

As announced at the PLL TS Roundtable meeting at AALL and in the CRIVGram on August 10, 1999, LEXIS Publishing has formed a Librarian Panel to work with the company on specifics on various aspects of decision making, particularly focusing on technical services. LEXIS Publishing asked the assistance of the CRIV to select the members of the Librarian Panel. In order to have the appropriate information to create a balanced panel of workable size, LEXIS and the CRIV decided to create a volunteer form. A number of volunteers' names have been received through a number of sources, including through self-volunteering and/or CRIV member recommendation. The selection of panel members was made jointly by the CRIV and LEXIS Publishing.

The scope and responsibilities of the Librarian Panel will include:

- discussing product packaging issues and the impact on the librarian community;
- acting as a sounding board regarding librarian communications in general;
- discussing invoice integration and the impact on the librarian community; and,
- discussing customer service integration and the impact on the librarian community.

It is expected that the Librarian Panel will remain in place through the end of the year 2000. Panel members will meet at least once with a meeting scheduled for October 19 and 20, 1999, in Dayton, Ohio.

LEXIS Publishing and the CRIV jointly selected the Panel members. Emphasis was placed on those librarians with technical services experience, particularly those who have worked in different aspects of technical services and those that have performed technical services work in a variety of organizations.

We are pleased to announce the following as the members of the LEXIS Publishing Librarian Panel:

Cynthia Aninao  
Acquisitions Librarian  
University of Cincinnati  
Cincinnati, Ohio

Melody Lembke  
Technical Services Librarian  
Los Angeles County Law Library  
Los Angeles, California

Mary McKee  
Associate Law Librarian for Technical Services  
Fordham Law School Library  
New York, New York

Anne Morrison  
Assistant Law Librarian  
Prince George's County Law Library  
Upper Marlboro, Maryland

Anne Myers  
Head of Technical Services  
Boston University Law Library  
Boston, Massachusetts

Betty Roeske  
Technical Services Librarian  
Katten Muchen & Zavis  
Chicago, Illinois

Lorna Tang  
Head of Technical Services  
University of Chicago  
Chicago, Illinois

You are welcome to contact any Panel member, or Cindy Spohr (LEXIS Publishing) with questions, comments, or concerns regarding the work of the Panel. Updates will be provided through *The CRIV Sheet*.

# AALL Committee on Relations with Information Vendors

## Form for Filing a Complaint Against a Publisher or Dealer

For quicker response, visit CRIVPage on the WWW, where you can fill out and submit this form electronically:  
<http://www.aallnet.org/committee/criv/complain.htm>

Complainant Librarian \_\_\_\_\_

Library \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

E-mail \_\_\_\_\_

Date \_\_\_\_\_

Note to Complainants: Prior to filing a complaint, individuals are expected to have attempted to resolve the issue at hand. To avoid duplication of effort, please forward copies of all correspondence to or from the vendor to the address below. Copies of notes from conversations with the vendor will also be helpful.

Vendor \_\_\_\_\_

Nature of problem:

Billing

Unsolicited materials

FTC Guidelines violation

Non-receipt of merchandise

Content of product (include samples)

Other (please specify): \_\_\_\_\_

\_\_\_\_\_

Brief explanation:

\_\_\_\_\_

\_\_\_\_\_

Send this form and all supporting documentation to:

Christine Graesser  
Chair, CRIV Mediation Subcommittee  
Brown Rudnick Freed & Gesmer  
City Place I  
185 Asylum Street  
Hartford, CT 06103-3402