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

The CRIV Sheet

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

CRIVPage

Anne K. Myers (Chair; CRIV Webmaster)
Boston University
amyers@bu.edu

Janice Snyder Anderson

CRIV Tools Subcommittee

Janice Snyder Anderson (Subcommittee Chair)
Georgetown University
anderjan@law.georgetown.edu

Michael J. Bushbaum
Anne K. Myers
Michael Saint-Onge

Mediation Subcommittee

Stephanie Edwards (Subcommittee Chair)
Roger Williams University School of Law
swe@rwulaw.rwu.edu

Carol Rogers
Michael Saint-Onge

Annual Meeting Subcommittee

Michael Saint-Onge (Subcommittee Chair)
LEXIS Publishing
michael.saint-onge@lexis-nexis.com

Claire Engel
Sara Galligan
Carol Rogers

New Product Award Subcommittee

Michael J. Bushbaum (Subcommittee Chair)
Valparaiso University
mike.bushbaum@valpo.edu

Michael Beard
Stephanie Edwards

Site Visits Subcommittee

Claire Engel (Subcommittee Chair)
Nelson Mullins Riley & Scarborough
cae@nmrs.com

Michael Beard
Sara Galligan
Carol N. Rogers

The CRIV Sheet

Michelle Wu

George Washington
University
Washington, D.C.

Editor's Corner

As another year of *The CRIV Sheet* comes to a close, I am delighted to present you with the reports from an informative and productive site visit with The Bureau of National Affairs, Inc. The committee visited BNA on March 15–17, armed with enthusiasm and the usual host of AALL members' questions. This year, we did not have a Best Practices Subcommittee at the site visit, but we were able to address some best practice issues within specific topics. The end of the visit brought exhausted but pleased CRIV members. Although not all of the membership's issues were resolved, BNA and the CRIV were able to start a dialogue on library concerns that will extend well into the future.

Following the editor's column, CRIV Chair Chris Graesser provides a succinct description of the site visit process, explaining the goals, expectations and procedures that accompany any visit. Because many members, especially the newer ones, are mystified by the CRIV and its various activities, this glimpse of the CRIV's inner workings should serve as a small but accurate reflection of our practices. Graesser will also preview upcoming CRIV-sponsored events that will satisfy (we hope) your inquiring minds and improve communication between publishers and librarians.

Before delving into the details of the BNA reports, I want to restate the message that the CRIV includes with every site visit issue. Because many concerns share common solutions or explanations, individual reports may contain some overlapping information. Rather than asking members to reference multiple articles, overlapping information will be contained in each report where relevant.

The first article, presented by Michael Beird and Michael Saint-Onge, presents the flavor of BNA by describing the organization of the company. As BNA has weathered many changes and is currently undergoing yet another metamorphosis, these two authors examine BNA from a historical perspective as well as from a forward-reaching one. They elaborate on upcoming changes at BNA and how these changes may affect libraries.

Next, Stephanie Edwards and Anne Myers tackle that oh-so-popular topic of customer service. As many librarians have noted, BNA's "recent" advent into electronic publishing has not been without difficulties. BNA is fully aware of customers' concerns and is anxious to address them. One of its current projects involves retooling its customer-service operation to better serve customer needs. The present customer-service

operation was structured around print products, and BNA's managers now realize that rapidly changing technology requires a different approach. At the same time, they want to maintain their quality in answering print product questions.

Margaret Maes Axtmann, Claire Engel and Carol Rogers then introduce the hot topic of the visit: electronic products. Librarians were particularly vocal about pricing and customer service in relation to these products. The article addresses those questions, specifically those of pricing models, licensing, and preservation and retention. A significant segment of the CRIV's visit was devoted to discussion, analysis and evaluation of BNA's current licensing scheme. This article also addresses contract negotiation and service requirements on electronic subscriptions.

In another article, Stephanie Edwards and Anne Myers return to discuss BNA's business system and how it impacts billing. As with other publishers, BNA continues to struggle with an outdated business system. Edwards and Myers describe the past, present and future efforts, and why certain solutions failed before implementation. They will also provide information that will make it easier for librarians to work with BNA's existing business system, while customers wait for it to be replaced or updated.

Print publications are featured in the next few pieces. Chris Graesser and Janice Anderson review pricing questions for BNA Books. Sara Galligan examines delivery issues for BNA products outside the BNA Books line.

As always, these reports as well as subsequently submitted but related materials can be found on the CRIVPage at <http://www.aallnet.org/committee/criv>. Past site-visit reports can also be found on this page.

To close this issue of *The CRIV Sheet*, Stephanie Edwards, CRIV's mediation chair, will discuss a hotly debated and frequently occurring concern: customer service. Her article will provide library staff with suggestions on how to reduce or resolve the outstanding customer-service problems that plague their libraries. So before pulling your hair out, take a look at Edward's article. And when all else fails, please take advantage of services available through the Mediation Subcommittee at <http://www.aallnet.org/committee/criv/mediation/index.htm>.

We continue to look for contributors to *The CRIV Sheet* and "CRIV Notes." If you have some tips to share, please consider writing an article! Submissions should be sent to mwu@burns.nlc.gwu.edu.

Message from the Chair

Chris Graesser

*Brown Rudnick
Freed & Gesmer
Hartford, Conn.*

I am pleased to report that the CRIV has completed yet another successful site visit; this time to the Bureau of National Affairs in Washington, D.C. Although we report on all of our site visits, site visits still seem to be a bit of a mystery to both librarians and publishers. So I thought I would give you a glimpse of 48 hours in the life of the CRIV, when its members met for a site visit in Washington.

Day 1

The Committee met in the afternoon to go over the comments from the survey we posted on law-lib and other listservs the prior month. A member of the Site Visit Subcommittee had organized the comments by the categories you will see in the reports. From this list, we discussed what topics deserved the most attention, and groups of Committee members were assigned to lead discussions on these topics at our meeting the next day with BNA.

That evening we had a reception and dinner with senior executives of BNA. The CRIV has learned over the years that an informal reception prior to a sit-down dinner provides an excellent opportunity for CRIV members to ask more specific questions and learn about employees' roles and responsibilities in a company. It is a great way to get discussions going and help the publisher representatives relax. Believe it or not, publishers get very nervous when the CRIV comes to visit, and BNA took this visit very seriously.

Day 2

Bright and early, the CRIV sat down with BNA managers and pursued an agenda based on the librarian survey. We had a tentative schedule that allotted a minimum amount of time for each topic, but all participants were aware that the schedule was flexible. During discussions, particular ideas or facts may require more attention. We constantly adjust the schedule to accommodate the additional interchange. The meeting ran all day, with a few breaks, which tended to be spent in more discussions among individual BNA folk and CRIV members.

The tone of the meeting with BNA, as it has been in previous site visits, was cordial but frank. BNA President and CEO Paul Wojcik began by admitting that BNA needed to improve its customer service and billing systems (see more about that in the other reports). The better part of the day's discussions was spent on electronic product issues. When we broke for lunch, Committee members took the opportunity to "huddle" and discuss how the talks were faring. We agreed that there were unresolved issues; we asked some of the BNA managers remain to answer more questions. The CRIV is dedicated to finding real answers and truly useful solutions.

Invariably during these meetings, the publisher says, "We had no idea librarians felt this way." Even though such problems or suggestions might come up on law-lib or with a sales representative, sometimes the message does not get through without a little face time with the managers, who rarely interact with librarians. Probably the No. 1 issue we volleyed back and forth was the concept of concurrent user licenses. Even though concurrent licensing is an accepted practice with some other

publishers, it presents a major paradigm shift for BNA. The CRIV does not expect to convert every participant to our point of view at site visits; we are sometimes content to plant a seed in the thoughts of publishers.

By the end of the afternoon, we were completely off schedule, but we had been able to pursue most of the subjects to the point where BNA understood where librarians were coming from and the CRIV understood the challenges BNA faces in providing quality information products. We had another dinner with a smaller group from BNA, which allowed for some follow-up conversations.

Day 3

A site visit provides the CRIV with a valuable opportunity to establish an honest, working relationship with a publisher, but it does not begin or end there. On the morning of Day 3, the Committee reviewed the meeting and decided on what we wanted to report to AALL members. We also strategized on how to keep the relationships we have established with the publisher going in a way that will benefit librarians. In the case of BNA, the publisher is very interested in establishing a Librarians' Advisory Panel to help BNA as it plans its new billing system and continues the major reorganization currently in progress. The CRIV regards this as an excellent opportunity to provide input with a publisher before problems arise.

Who Pays?

AALL and the publisher split the costs of site visits, which include travel, hotel and food. I'll be honest; the publisher foots most of the bill, because AALL can't afford to pay for it all. Mindful of this conflict of interest, the CRIV is exploring other opportunities to interact with publishers for the benefit of librarians. To that end, we have conducted "reverse" site visits, where publishing executives visit libraries. We are also inviting specific divisions of publishers to meet with us at the AALL Annual Meeting. But there is no substitute for visiting publishers on their own turf. Key people who don't usually attend AALL can be on hand at the publishers' headquarters, and the CRIV can gain valuable insight into the corporate culture and structure of a company.

By taking the time to travel and prepare for a site visit, the CRIV and AALL make a statement to publishers that we are dedicated to finding productive solutions to the challenges that face both the profession and the business of legal information. The CRIV is composed of librarians with a real interest in helping their colleagues. While we do not pay the monetary costs, we do take time from our own jobs and private lives to make these visits. Yes, a conflict does exist, but the CRIV recognizes it and more than compensates, as publishers who have hosted site visits can attest.

Upcoming CRIV Events

The CRIV has a program scheduled for the Annual Meeting in Minneapolis that explores the roles of librarian-relations programs within publishing companies. The program is intended to help librarians learn more about the staff and services in these programs.

The CRIV is also working on an open forum devoted to the issue of electronic licensing, which will give librarians a better idea of how to negotiate licenses that work best for their individual libraries. Librarians and publisher representatives will be featured on the panel. Check out your final Annual Meeting program for details.

I am looking forward to seeing many of you this summer. If you have any comments or concerns about a publisher issue, please

feel free to give me a call. I'm in the office 9 a.m. to 1 p.m., Monday to Friday.

Would you like to edit *The CRIV Sheet*? The CRIV is looking for future editors! If you are interested, please contact Chris Graesser, 860/509-6549 or cgraesser@brfg.com, or Michelle Wu, 202/994-7338 or mwu@burns.nlc.gwu.edu.

Site Visit to The Bureau of National Affairs, Inc.

Michael Beard

University of Arkansas
at Little Rock
Little Rock, Ark.

Michael Saint-Onge

LEXIS-NEXIS
Librarian Relations
Consultant
San Francisco, Calif.

BNA Organization Structure

The Bureau of National Affairs, Inc. is a leading publisher of print and electronic news and information, bringing to corporate and government leaders in diverse fields intensive coverage and analysis of legislative and regulatory developments. The company has a long and interesting history.

History

Originally a part of U.S. News Publishing Company, BNA started in 1929 as a news division that assigned journalists to report on congressional sessions and federal administrative hearings. As the U.S. government grew, so did the need for accurate and impartial reporting. The Bureau of National Affairs filled that niche.

During World War II, BNA experienced significant success by creating some of the publications that reported on daily events related to the war effort, including *Daily Oil Report*, *Daily Production Report* and *Daily Price Report*.

After the war, Dean Dinwoodey, a senior editor at BNA, got other senior editors together and accepted an offer to jointly purchase BNA for \$600,000, with \$10,000 down and the balance payable over eight years. From the start, it was understood that its employees would own the company, making it the oldest wholly employee-owned company in the United States.

Soon after the purchase, the editors began preparing to publish a book on the *Taft-Hartley Act*, seminal legislation in the area of labor relations. When President Harry Truman vetoed it, BNA gambled that the veto would be overridden by Congress — and continued its printing. When the veto was indeed overridden, BNA had a book in the marketplace immediately and it sold more than 20,000 copies. This early success bolstered the fledgling company, fostering its reputation as the place to go for legislative and regulatory information.

By focusing on impartial reporting of information in a timely manner, BNA's credibility on Capitol Hill continued to grow. In the last 55 years, the company has grown and expanded while remaining focused on its primary objective: helping professionals cope with government rules and regulations. Its publications now span the subjects of labor, the environment, intellectual property, antitrust, securities and many others.

Employee-Owned

Employee ownership has served as a bedrock of the company since 1947. This has a number of ramifications on the way BNA conducts business: It does not have to report to a shareholding public demanding quarterly and annual results. It tries to see the long-range implications while making decisions, and is willing to forego quick profit for long-term investments that will bear fruit at some future date.

In addition, employee ownership has contributed significantly to the stability of its workforce. CRIV members were struck by how many employees had been with the company for a substantial number of years. The feeling among the staff is that of a family, which contributes to the sense of overall job satisfaction.

Employee ownership also means that every employee, from customer service to the chief executive officer, has a vested interest in the success of the company. Problem resolution and customer satisfaction take on a whole new meaning when you are working with people who have a stake in the company.

The downside of employee ownership is that BNA is not a huge international corporation with billions in assets: BNA brings in about \$300 million a year in revenue. Company spending must be more cautious because there is much less room for costly mistakes. In addition, the extensive reporting process — conducted with the highest possible quality control to guarantee accurate, unbiased reporting — is expensive.

With about 2,000 people in the company, BNA devotes more than half its revenue to employees and their benefits. About one-third of the workforce is devoted to operating the editorial division, with the remaining two-thirds comprising circulation, printing, infrastructure and administrative functions.

Organization

There are seven companies under BNA's umbrella, the largest of which are BNA, Inc. and Tax Management Inc. A small but important department within BNA is BNA Plus, which is a research service with document delivery. BNA International, based in London, maintains its own separate editorial and marketing departments. In addition, BNA owns a printing facility, McArdle Printing Company. The company known as Pike and Fischer, familiar to many law librarians for its focus on communication law, was acquired in the 1980s. Recent acquisitions probably more familiar to the private law library

sector include Kennedy Information in New Hampshire and Institute of Management and Administration, Inc. of New York. Both are publishers of newsletters of interest to the professional community.

BNA's philosophy on acquisitions is to acquire publishers with complementary content that remain focused on high-quality reporting to their markets. Rather than being integrated into the overall BNA structure, these companies continue to run as separate companies with separate editorial, accounting and customer-service structures, thereby avoiding the significant problems many other publishers have faced when trying to bring acquisitions into the corporate structure. BNA's organizational goals are: to remain independent, i.e., employee owned; to grow, especially by acquisition of content companies; and to generate and cultivate its own content.

For about 55 years, BNA has been a successful print publisher organized along traditional lines — editorial, circulation and production — but the migration of delivery to electronic formats is forcing it to re-examine the way it does business. About 45 percent of its revenue is now derived from electronic delivery. The addition of electronic publishing to traditional print

publishing warrants restructuring into business units — projected to be completed this summer — and has encouraged management to create a customer contact center under the vice president for sales and marketing to ensure that customer concerns are dealt with in a timely manner. This reorganization will allow it to concentrate on the pricing and delivery of electronic products, especially licensing issues.

Based on the comments we received from the membership prior to the CRIV visit, this particular area was of interest and concern to many AALL members. As this reorganization is completed, BNA will be in contact with the CRIV to help spread the word and to answer any questions and concerns that surface along the way.

Conclusion

BNA President and CEO Paul Wojcik and its senior management devoted the entire day to meeting with the CRIV. It was clear to CRIV members during our visit that the executives at BNA see the CRIV as a valuable tool in helping them identify and address these customer concerns. The opportunity for these two entities to work more closely together should result in higher customer satisfaction.

BNA Customer Service

During our site visit to BNA in March, the CRIV had the opportunity to discuss BNA's customer-service and support operation in considerable depth with Pat Swords, vice president for sales and marketing; Donna Ives, director, customer contact center; and Gary Seltzer, manager, circulation. Our dialogue focused on the impact of technological and marketplace changes on customer-service expectations, managing law-library accounts; the recent experience of AALL members with BNA customer service, as reported in surveys by CRIV before the site visit; and the significant changes BNA is now making in its sales organization and staffing to improve its responsiveness to customers.

BNA began an in-depth review of its entire customer-service and support functions one year ago. The review has led to a major structural reorganization, which BNA announced during the CRIV's site visit. Historically, the company has focused on production first and foremost, and in a simpler era, good customer support followed. In conducting a reorganization of its sales and support functions, BNA acknowledges that timely delivery, support and resolution of customer-service problems are fundamental components of its product quality.

Current Organization and Staffing

Currently BNA's core customer-service operation is the customer relations unit whose staff answers the 800/372-1033 number and handles the customer e-mail account, customercare@bna.com. The staff of 35 plus four managers handles all matters dealing with account inquiries, billing, orders, fulfillment issues and electronic product access. Customer relations will forward calls to other customer contact units as needed for technical or product-specific issues. If you do not have a question answered satisfactorily, you should ask to speak to a manager.

Because customer care at BNA is currently splintered into different units and departments, overall effectiveness is greatly reduced and too often results in a "disconnect" for customers who need immediate resolution of a problem. Although the current organization emerged from a fairly traditional division between print and electronic sales, support, circulation and billing, BNA now realizes that this model is falling short of meeting customers' needs, especially with the growth of electronic products and all of their attendant support and service issues. Customer-service units often perform parallel tasks or hand account problems back and forth across departments. Not surprisingly, customers sometimes receive different information from different units, and problems are not always resolved in a timely fashion. This type of experience was evident in a number of the comments the CRIV received from AALL members.

Customer Care Restructuring

After a comprehensive review that began last spring, BNA is consolidating all of its customer-service teams in its Rockville, Md., center. The transition is already underway, and BNA hopes to have the first stage, relocating the units, in place by the end of June 2001. Under the new structure, which brings together everything from sales to technical and customer support, customers will be routed directly to unit specialists for immediate resolution of problems. The initiative marks BNA's commitment to meeting the needs of its library customers instead of attempting a simple "band-aid fix." (BNA managers indicated that they already had many "band-aids" in place, and it was time for a new approach.)

Under the reorganization, the new division will have three components, in close physical proximity to one another: sales; contracts (enlarging the group which currently administers contracts exclusively for electronic products); and Customer

Stephanie Edwards

*Roger Williams
University School of Law
Bristol, R.I.*

Anne Myers

*Boston University
Boston, Mass.*

Contact Center. The new Customer Contact Center and how it will operate became the focus of our discussion on improving service to our membership, inasmuch as BNA believes that it will more effectively address the needs of law libraries.

As it was explained to the CRIV, the Customer Contact Center will be comprised of four units that will work in close coordination to handle the following:

Customer Outreach — for follow up with the customer on “after-the-sale” issues, including training;

Customer Service — to handle questions and problems relating to circulation, subscriptions, accounts/billing, and technical and product support;

Account Management — designed to support large customer accounts for both print and electronic products. Some of these customers will be assigned individual account managers at BNA to respond as needed to specific changes or requirements. BNA has implemented a pilot program with 80 customer accounts to date and plans to add additional customers in phase two of the program. BNA will initiate contact with large accounts as the program expands and trained staff are available to provide effective support.

Processing — includes standard non-contract electronic billing, fulfillment (i.e., compiling and shipping products to the customer), and an Electronic Customer Sign-On group to assist with username and password problems.

What to Do Now

Until the new organization is completely in place, customers should continue to call 800/372-1033 for problem resolution. While this is the single best conduit into BNA for customers, there are several “direct” 800 numbers if you already know exactly which group you wish to reach:

- BNA PLUS at 800/452-7773 or by e-mail at bnaplus@bna.com is available to answer product content questions, conduct research and provide documents.
- BNA Software’s technical support group can be reached at 800/424-2938.
- BNA Books has its own customer-service unit, which can be reached at 800/960-1220 or on the Web at <http://www.bnabooks.com>.

As many law library customers already know, the most efficient way for BNA customer service to search its system is by account number, which will differ from title to title. Having that number ready whenever possible when you call with questions or problems will facilitate resolution. However, if you do not have the number handy when you call, there are additional access points which will work but may be more time consuming.

In discussing the concerns of law-library customers over ongoing subscription and account problems, BNA stressed that if customers are not satisfied with the way their problems are being addressed, they should not hesitate to call a supervisor or Heidi Clemmer, manager of customer relations. She can be reached by e-mail at hclemmer@bna.com or by phone at 301/294-6607.

BNA agrees with the CRIV that it is important to communicate with library customers about changes affecting customer relations. BNA will therefore be working with the CRIV to communicate changes as they take place, using CRIVGrams and other means.

Training

Comments from AALL members noted concerns with turnover of customer-service staff at BNA. The CRIV asked customer-service managers about this perception and also inquired about the training given to new staff in the departments. Gary Seltzer, circulation manager, indicated that at present there are approximately 40 people working in the BNA customer-service unit. Despite a 50 percent turnover in staff over the last three years, there are upwards of 15 staff members who have logged more than 15 years’ experience each. Interestingly, most of the customer-service staff who left transferred to other departments within BNA, bringing with those departments valuable customer-service experience and orientation.

New customer-service staff receive intensive training on BNA products for several months and do not begin taking calls until the end of their third month. Thus, a fairly broad knowledge of the various BNA products is expected by the time the staff begins to field calls. During the fourth through sixth months on the job, trainees are monitored very closely as they take calls. A senior group leader is always nearby if staff cannot answer a question or resolve a problem. In addition, two supervisors are within the unit. As noted earlier, customers should not hesitate to involve customer-service supervisors if customers’ expectations are not met on an initial call.

AALL members may have felt frustrated when they called BNA because they had to start from square one because BNA had no record of earlier calls, or BNA told them that there were no other complaints about a particular problem. In fact, because of systems limitations, BNA does not have the capability to log or archive customer comments, either by customer or product. Staff therefore have to rely on communicating with one another in person and by e-mail as they become aware of problems with particular titles or accounts. BNA acknowledged to the CRIV that its system is inadequate in this and other respects. BNA is committed to building a knowledge management database to maintain and track this kind of account and product information. BNA was receptive to the CRIV’s recommendation that information about products, particularly where it relates to known problems or delays, be made available on BNA’s Web site.

BNA: Electronic Products

The largest number of concerns expressed during the CRIV's solicitation for comments for the BNA site visit centered on BNA's electronic products. The CRIV and BNA discussed concerns such as Web licensing, pricing of Web products, archiving and ownership of Web and CD-ROM products, CD-ROM platforms, various technical problems, and training.

Licensing

The CRIV received far more comments on electronic licensing than on any other category. Currently BNA has four basic models for licensing its electronic products. It is important to note that these are models only and that BNA stresses that each library should negotiate according to its own needs.

License-Type Characteristics

- **Library:** Only one librarian or researcher has full Web access. E-mail is routed to end-users. End-users must request full articles from the librarian, who retrieves articles and forwards them to the end-users.
- **Specific User:** Named users each have individual user names and passwords.
- **Site:** Access is for ALL users at defined locations. Customers may license one or all locations. Locations are written into the license with the full address. A maximum user cap is set and written into the license. ONE username and password for ALL users and ALL titles.
- **Enterprise:** Access is for ALL users at ALL locations. All locations are included in the license but not written into the license. A maximum user cap is set and written into the license. ONE username and password for ALL users and ALL titles.

BNA is currently developing a licensing model for academic law libraries. This will be presented to the New England Law Library Consortium in the near future for its feedback. BNA hopes to roll out a licensing model to the law schools within the next several months.

A number of libraries, regardless of type, expressed a strong desire to see BNA implement a concurrent user license. Unfortunately, at present, BNA does not have the technology to implement concurrent user licensing. However, if your organization has the technological capabilities to cap the number of users, BNA is willing to negotiate a concurrent user license with you.

For those concerned with the high cost of providing library or librarian access, BNA will provide access to a designated library recipient without that recipient indicated as a user under all of the licensing agreements except the library license. However, to obtain this access, you must articulate the need and include it in the agreement. The CRIV suggested to BNA that library or librarian access should be considered the norm.

BNA's reorganization — see "Organization" section on page 4 — will affect licensing. The reorganization will bring together its licensing functions, including billing for the licenses. This new arrangement will speed the licensing process.

Customer Support

The reorganization will also bring together customer service and support for Web products. BNA's goal is to have a centralized location for all customer concerns.

BNA does not presently have the technology in place to provide statistics regarding the number of hits each Web product receives.

Pricing

Pricing of issues were a common concern in relation to electronic licensing. Librarians frequently voiced concern about the high cost of electronic materials. BNA responded that unlike most other legal publishers, it has always been and continues to be a content-creation company, which requires the high cost of maintaining a corps of experienced reporters. In addition, as with our own organizations, BNA has had to develop and/or add the technology necessary for electronic information. Its information technology department began about 15 years ago with five people. Currently there are approximately 65 staff members. Carol Clark, acting director of information technology, shared with us the need for and costs associated with T3 bandwidth, backup lines, routers, hubs, servers, software, significant hardware infrastructure, royalties for search engines and other software, as well as the ever-growing need for expanded skill sets for staffing.

The CRIV and BNA also discussed pricing discounts on print versions of electronic products. Standard discounts are given for each of the pricing models referenced above. Print copy retention is not required. However, if you wish to retain print, the standard discount for electronic licenses is 75 percent off the first print copy of a notification service and a 50 percent discount on additional print copies for every 10 sets purchased. If the print service is discounted based upon an electronic subscription, at least one electronic user must be at the location where the print subscription is mailed.

Archiving and Other Technical Issues

The CRIV also responded to archiving concerns. Librarians need to recognize the distinction between a purchase and a licensing agreement. We purchase, and therefore, own the print copy. We sign a license agreement for the use of electronic products. This does not entitle us to an archive. For those concerned about the ability to archive CD-ROM products, BNA reports that its December disks do not expire. For those concerned about archiving the Web product, each licensed user or library can print and archive a hard copy of the newsletter publications. In the case of BNA's Web reference library publications, consider negotiating receipt of the December CD-ROM for archival purposes.

Several technical issues were discussed. BNA has begun to offer IP authentication for site and enterprise license customers and stressed the need to test each new organization's IP address before going "live" to determine possible problems, such as firewalls.

The CRIV received several comments regarding broken links. Broken links in e-mails are being addressed. BNA repairs broken links when they are reported and encourages users to report any broken links to customer service. Often the broken links are

*Margaret Maes
Axtmann*

*University of St. Thomas
Minneapolis, Minn.*

Claire Engel

*Nelson Mullins Riley
& Scarborough
Columbia, S.C.*

Carol N. Rogers

*Latham & Watkins
Los Angeles, Calif.*

associated with URLs that wrap. BNA is working on a solution for the problem.

BNA requests that electronic users contact customer service for any technical problems. Netscape users should talk with technical support about browser settings. BNA plans to have a dedicated group for electronic customer sign-on in place later this year. This group will replace the current Hoover's Site Administrator's page.

In reference to questions about differences in CD-ROM platforms, BNA reported that the only CD product with a different platform is *Tax Management*. All other CD-ROM products are based on the same standard platform.

The CRIV also discussed the poor communication librarians received about platform changes. BNA acknowledged the numerous problems encountered during platform changes and hopes to do a much better job of communicating any known or potential problems in the future. A CRIV member suggested that BNA establish a system to broadcast messages to electronic users when there are BNA system problems.

Training

We also discussed training issues. The CRIV suggested to BNA that it provide follow-up training three to six months into a new subscription to take into account new students and/or new employees at law firms.

Stephanie Edwards

Roger Williams
University School of Law
Bristol, R.I.

Anne Myers

Boston University
Boston, Mass.

BNA: Business Systems

The current systems configuration at BNA is — by BNA's own acknowledgment — complex, massive, messy and antiquated. At its core is the Customer Accounts Records system, which was written in COBOL in the 1960s. Importantly, it is strictly a transaction-based system — i.e., order-based — and not customer-based. This explains why customers have any number of individual order or account numbers for individual titles and why consolidated billing is not possible. There are approximately 250,000 order records in the system; the best estimate now is that this database represents 40,000–60,000 customers. There are 18 major data stores and a myriad of desktop applications and workarounds to supplement this system, but it is clearly not sufficient to handle BNA's or its customers' needs.

Over the years, BNA has attempted to resolve the problems several times. No off-the-shelf software that meets BNA's specifications is available. Several years ago, some AALL members remembered hearing that a new BNA system was in the works that would permit greater flexibility in billing and account maintenance. Nothing ever came of it. In fact, BNA did contract with an outside vendor in the mid-1990s to create a new integrated system; it assigned a number of BNA staff members to work full time on the project for more than a year. Unfortunately, within a few months of a "go-live" date, it became necessary for BNA to pull the plug because the system was not stable or scalable enough to meet its needs. The disappointment within the company was considerable. This episode was followed in 1999 by a full year of Y2K remediation so that the old systems would continue to work into the new millennium.

In 2000, BNA formed a Business Systems Management Committee, composed of representatives from various

departments, with the purpose of bringing a team approach to the problem of replacing current systems completely with a new workable system. Cindy Bolbach, director of the committee, said that BNA is viewing this crucial project "not as an IT, sales, marketing, billing or customer-service problem," but as a "BNA problem."

Thus far the new committee's mission is two-fold:

- to identify short-term "bleeds" that must be fixed to keep the existing systems going and other short-term enhancements that cannot wait — i.e., creating a contracts database and a database to handle all e-mail notification service subscribers; and
- to find a long-term solution to systems needs and develop a plan for its implementation, using an incremental approach.

Right now the committee is gathering requirements for a new front-end order-entry system; it will decide whether to develop a new system or customize an off-the-shelf system by the end of the year. After the new order entry system is up and working, the committee will turn its attention to other pieces of the puzzle. According to Cindy Bolbach, a single account number and consolidated bill will not be available to customers until mid- to late 2002 at the earliest.

It is important to remember that the BNA Books division of BNA has its own independent order entry, billing, fulfillment and customer-service operations. The new BNA Books accounting system does not have the limitations of the system described above. See the "BNA Books" section of this report on page 9 for more information.

BNA: Print Products

The CRIV brought up a number of concerns relating to print products, based upon specific print product issues identified by AALL member input as well as print product issues that permeated through discussions relating to customer service, pricing and account numbers. These areas are covered in other sections of this report dealing with customer service and pricing, as well as a separate section on BNA Books. One of the specific issues unique to print product delivery is delayed receipt of some print products across the country. Due to the emphasis BNA placed upon it, a message that bears repeating here is that customers should always escalate a concern if they are not satisfied with the individual handling of their requests.

BNA reported that 55 percent of its revenues still come from print products. While the percentage is decreasing, the drop in demand is slow. BNA print products originate with the BNA parent company, which includes the BNA Books Division and several subsidiaries. Other subsidiaries include Tax Management Inc., BNA International, Pike & Fischer, Kennedy Information and Institute of Management & Administration. (See the BNA Web site at www.bna.com for more information about these subdivisions.) BNA also maintains its own print production facility, the McArdle Printing Company, Inc., which is also a subsidiary of BNA.

BNA emphasized the editorial excellence it strives for in both print and electronic products. BNA is a content company and not a data company. It recognizes that different talents are demanded by print and electronic formats to maintain quality. This also relates to how these formats are updated. Recognizing that many customers subscribe to both the print and electronic formats, BNA offers price reductions for print products. Some discounts are as high as 75 percent off the original print product price. Also, adding additional users to an electronic license helps reduce costs.

With regard to discounted print and electronic subscriptions, BNA detailed its policy on product location. If the print service is discounted based upon an electronic subscription, at least one electronic user must be at the location where the print copy is mailed. For example, if a firm has a five-user license to *Daily Tax Report on the Web*, the firm is entitled to one print *Daily Tax Report*

at 75 percent off of the full rate. If one user is in the Boston office, another in the D.C. office, and three users are in the Chicago office, the discounted print copy may be mailed to any of those three offices. It may not be mailed to the New York City office.

Delivery Delays

One issue of concern to librarians was the delay in receiving some print products. Citing delays of up to five days in receiving daily products such as the *Daily Labor Report* and the *Daily Tax Report*, librarians also indicated that the electronic version is sometimes not an option. BNA responded that it aims for overnight courier delivery in 30 metropolitan areas all over the United States at no extra charge. If hand delivery is not available, the fastest mail delivery is used at no additional charge. If you are uncertain as to your library's delivery schedule, contact BNA's Delivery Services group directly at 202/452-4575 or 202/452-4394, or call BNA's Customer Contact Center at 800/372-1033.

BNA provided a rough estimate of expected receipt times by geographic area. East Coast overnight hand deliveries should arrive between 8 a.m. and 10 a.m.; West Coast hand deliveries can be as late 11 a.m. to 4 p.m., depending on a subscriber's distance from the airport. BNA uses an outside contractor, National News Corporation, for hand delivery. National News Corporation has a toll-free number for customers to inquire about local delivery problems: 800/367-1525; 301/985-6292 in the Washington, D.C., area only.

Alternatively, if satisfactory answers are not provided by National News, BNA encourages customers to contact BNA's customer service at 800/372-1033. Staff receiving these calls have been instructed to give them high priority. After resolving the immediate issue, staff also should give the customer a follow-up call within one to two days to make sure that everything has been handled to the customer's satisfaction.

BNA encourages librarians to contact customer service for any problems with print products. Its new customer-support center would streamline customer-service support measures. For the time being, BNA encourages librarians with inquiries about print products to have the item's account number handy.

BNA Books

BNA Books is a division of The Bureau of National Affairs, Inc. Among its subject specialties are employment law, employee benefits law, labor law, intellectual property law, health law, legal practice and environmental law. The division publishes about 40 main volumes and supplements per year. Organizationally, BNA Books has been folded into the Legal Publishing Group, but the two management systems will remain separate for now and for some time into the future. This is partly because of the significant differences between how standing orders are processed and how subscriptions are processed. Therefore, BNA Books will not be part of the imminent changes described elsewhere in this issue of *The CRIV Sheet*.

The survey of AALL membership prior to the site visit turned up several issues of concern to our members. Topping the list was the high prices of the books. *Employee Benefits Law* and *The*

Fair Labor Standards Act were singled out as being priced egregiously high. Richard Cornfield, executive director of the legal publishing group, detailed the process that produced *Employee Benefits Law* and its 2000 supplement. He will explain in an addendum what generally determines the prices of BNA's books. This particular publication's high price is due to the extraordinarily lengthy and complicated process of putting the book together, which involved many authors from the Labor & Employment Law Section of the American Bar Association, plus one year's work by a full-time BNA Books editor. The supplement, which was written by another large corps of lawyers, went through a similar process.

Sometimes, BNA books are adopted by law school professors as class texts. The books are available to professors on a 60-day examination process. If a book is adopted, the professor receives a copy without charge. When queried about whether

Sara Galligan

*Dakota County
Law Library
Hastings, Minn.*

Chris Graesser

*Brown Rudnick
Freed & Gesmer
Hartford, Conn.*

**Janice Snyder
Anderson**

*Georgetown University
Law Center
Washington, D.C.*

the law school's library could also receive a free copy, BNA's response was affirmative, "Just ask."

The handling of standing orders is a source of confusion for some AALL members. Be aware that it is BNA Books' policy that all of its books are automatically standing-order titles. This means that new editions or supplements will be sent to libraries that have purchased earlier ones on approval, unless they had indicated that the previous purchase should be treated as a non-standing order. All titles may be returned within 30 days of receipt for a full refund or cancellation of all charges. A library can, of course, "opt out" of this service at any time by requesting that a title not be on standing order. Please be aware that if a library places another order for a publication that is already on standing order, it will receive a duplicate shipment. To avoid this situation, a library may request a list of titles that it has on standing order with BNA Books by contacting Judy Davies at 202/452-4410.

The issue of updating books on the Web was raised by one member. According to Margret Hullinger, BNA Books executive editor, only one publication, *Equal Employment Law Update*, is being updated at this time. Users can go to the BNA Books Web site, www.bnabooks.com, to find a list of cases already identified for possible inclusion in the next edition of this title. In the future, BNA Books will notify past buyers of the affected titles when these updates are available. (Questions for librarians: Should we reflect this updating mechanism on the volume? In the bibliographic record in the online catalog?) For the future, BNA is looking at putting the books themselves on the Web.

The customer-service operation of BNA Books is a separate operation from BNA, Inc. The phone number is 800/960-1220 and the e-mail address is books@bna.com. Those who experience difficulties in dealing with its customer-service people should not hesitate to take the problem higher within the organization. Hullinger will be happy to take phone calls directly. Before that, one can go to the Web site at www.bnabooks.com and click on "FAQs" to find basic information, plus names and numbers. BNA Books has also issued a handy little "Customer Guide" leaflet that contains useful information about orders and contacts.

The CRIV asked about the BNA Books practice of putting accounts on hold for non-payment of an invoice. Hullinger explained that accounts, including all new or standing orders on

a library's account, are put on hold for the following reasons:

- exceeding a credit limit
- non-payment of any open invoice within four months

The CRIV pointed out a couple of problems with this system. First, large institutional libraries would probably have problems making the four-month deadline for payment. Second, BNA was not adequately informing librarians as they placed new orders that the orders might be delayed due to the account being put on hold.

Following the site visit, Hullinger looked into those issues and provided the CRIV with the following responses:

- Large libraries can arrange with Hullinger to set a higher limit that is mutually acceptable to BNA Books and the library.
- If there is a problem with payment of an individual invoice, libraries may call Hullinger for assistance. BNA Books is willing to be flexible on an individual basis.
- Currently, when a book is ordered, a confirmation is sent to the customer and provides notification if the account and the order are on hold. In addition, BNA Books will modify final statements to notify customers that their accounts are on hold and that future purchase orders for the entire library account will be affected.

Barring any unforeseen circumstances, BNA Books' customer-service representatives will let phone-in customers know immediately if their accounts are on credit hold. However, more than half of BNA Book orders are placed by mail. As a result, it would be difficult to notify customers immediately that their accounts are on hold when their orders are placed. Therefore, librarians need to be aware of the status of their accounts by keeping close track of their payments and any notices they receive from BNA Books. If a library typically has a problem with overdue payments, its librarian should plan to ask about the status of the account as part of the ordering procedure.

Finally, BNA Books is planning to add a page on its Web site devoted to librarians. The page will include information about purchase options, billing questions and accounts. The folks at BNA Books wish to provide first-rate service and they welcome our questions and comments.

BNA Statement on the Pricing of BNA Books

We understand that the members of AALL are concerned that BNA books are becoming increasingly expensive. Of particular concern to AALL is the new second edition of *Employee Benefits Law*, with a list price of \$655.00. *Employee Benefits Law*, second edition, was the culmination of an exhaustive five-year effort by more than 150 members of the ABA's Labor & Employment Law Section, representing management, plaintiff, union and "neutral" perspectives. These individuals provided unmatched expertise in examining the intricacies of employee-benefit law, thus creating the best treatise in the field. In addition to the new main volume, we published a supplement in order to make the book as current as possible. Here again, a separate group of more than 100 section members came together to make this effort possible.

Bringing a group of individuals of such scope together to write this treatise, and then to edit and bring into agreement the many views presented, takes a tremendous amount of time, effort and money. We make every attempt to offer our customers the most complete, balanced, well-written and reliable product possible, and this comes at a price. While we do make a profit at the end of the day, we try not to do that to the detriment of our customers. We make every effort to price our books as fairly as possible.

Margret Hullinger
Executive Editor and General Manager
Books Division, BNA

The following article has been provided by the vendor to further explain an issue raised in the previous article. The presence of this article is not intended to be an endorsement of the named vendor or its products by the CRIV or AALL.

Haunted by Problems? Customer-Service Follow-Through Tips

Stephanie Edwards

Roger Williams
University School of Law
Bristol, R.I.

How many times have you hung up the phone after a call to a publisher believing that you had resolved a problem for good, only to find the same problem or error still hanging over your account a week, month or year later? Unfortunately, this experience is all too common in this age of larger and larger publishing operations and completely automated account management. In almost every library, certain unresolved problems take on a life of their own, warranting their own file folder and becoming legendary to the staff who have tackled the job of resolving them. Eventually, the problems may be completely resolved, but they leave behind a lasting sense of frustration and mistrust that is even harder to repair.

The comments the CRIV has solicited from AALL members in recent years suggest that occasional problems with publishers are met with a certain amount of tolerance and even goodwill when the publisher is able to resolve a problem swiftly and effectively. However, the reservoir of goodwill quickly evaporates when the librarian is given incorrect information, has to ask for the same correction numerous times, receives promises that are not fulfilled, or is bounced from person to person with no prospect of a resolution.

The temptation may be to dismiss publishers' customer-service failures as a willingness on their part to tolerate poor service as long as they can sell their products. Some librarians have adopted this cynical attitude as a result of their experiences over the years. However, it stands to reason that most publishing companies have no desire to become known for poor service or for tolerating inaccuracy or error. Besides, problems of an ongoing nature absorb the time of staff at every level from the packing room to management level and can prove very costly. In some cases, too, the source of the error can be traced to unclear or inaccurate information provided by the customer.

The members of the CRIV always devote considerable time during their publisher site visits to explaining the effects that persistent customer-service problems can have on libraries. We are gratified when publisher representatives respond positively to the specific examples we give and are willing to advise us what we can do to help improve their services.

Here are some tips for librarians who find themselves dealing with seemingly simple problems that have mushroomed into large ones or refuse to go away. Despite the complexity of situations like this, some basic practices can make it easier to identify, document and resolve problems.

Avoid delay. The fastest way to compound a problem is to put it aside or to wait to "see what develops." Instead, save yourself and others at your library a lot of work by being proactive. If an item you returned three months ago is still appearing on current statements, or if orders for one of your firm's accounts are suddenly being shipped to the wrong location, or if all of your standing orders have been dropped, *act immediately!*

Assign the problem to one individual in your organization. Once it has become clear that a "simple" problem will not be easily resolved, or worse, that it has begun to cause new problems with the account, designate one person to act as the library's contact in this matter. This is especially true when a firm has a problem affecting two of its branch accounts, or in a library where serials or standing orders and invoicing are handled by separate people. Make it a point to tell the publisher representative the name of the person who is handling the problem; request that the representative communicate specifically with that person.

Identify the publisher or vendor representative or manager who can best help you. Use the working relationships that you have developed, such as with an assigned account representative or any other individual who has provided assistance in the past. If the publisher employs a librarian liaison, contact him or her. You may want to use your account representative as the primary contact, and forward copies of ongoing correspondence or status reports to the library liaison. Use the list of vendor contacts on the CRIV's Web site — see CRIV Tools — if you are not sure whom to call.

Due to the very nature of the most stubborn problems, you must be prepared to escalate your request to the next level if necessary. Remember that the failure of someone in customer service to fix your problem immediately, once and for all, may not be his or her fault. Depending on how much information representatives can access during your calls, or whether they can actually modify information or make corrections from their workstations, they may not be able to handle problems of special complexity. In these cases, as when you suspect actual mishandling of any matter, go to their department managers or supervisors.

When you find the appropriate person who can provide effective help, direct any questions or communications pertaining to the problem to that person. Even if you have to wait while that person is on another call or away from the office, you may get results more quickly in the end by waiting for his or her assistance rather than allow someone who is not familiar with the problem take your call.

Be courteous and patient. As we all know, problems that seem to defy solution can be a real test of character. While you may be extremely frustrated after several futile attempts to solve a problem, keep your equilibrium. If your expectations are reasonable, have faith that ultimately a solution can be found. Instead of reacting in a sarcastic or angry manner with someone whose service does not meet your expectations, try a different tack. A phrase that has proved useful on occasion in our library is: "I understand from you that you cannot make the corrections we are insisting on today. Would you please transfer me to someone — your department manager or someone else — who can help me with this?" You have a right to expect courtesy in return. One

simple rule of old-fashioned etiquette is also a sine qua non when it comes to follow-through at work: Return all phone calls.

Document every communication. When it becomes apparent that a problem has recurred or multiplied, start a folder specifically for materials relating to this matter. In this way, you can keep all of the information pertinent to the problem handy. If you interfile correspondence, invoices and notes relating to a problem with general information about a publisher, you will not be able to access it when you need it. After time has passed, it becomes harder and harder to remember and reconstruct the relevant information.

While it is a good practice to keep a log of *all* phone calls and other communications with publishers on a daily basis, it is absolutely crucial to do so when dealing with problems that seem especially persistent. Never hang up the phone without asking the name of the employee or representative you have spoken with! This information will make it much easier for the person who ultimately can fix the problem to know what has been promised and by whom, what has already been tried, and what has obviously failed. If you have no documentation of past efforts to solve a problem, it is never too late to start. Don't rant; document! Good records are more effective than anger in getting results. For ideas on how to organize a log, see the "Sample Publisher Log," one of the CRIV Tools on CRIV's Web site.

Ask for confirmation. When dealing with a problem of the pernicious variety, don't just ask the representative to "fix" it. Ask instead exactly what steps will be taken, and when you can expect the problem to be solved. Do not hesitate to ask for a

confirmation in writing or by e-mail or phone. This practice, just like asking for the employee's name in everyday transactions, ensures greater accountability. Of course it is not standard to ask for confirmation of every customer-service transaction, because there is an assumption of trust underlying those transactions. But once trust is compromised because of a failure of service, you have a right to expect promises to be backed up in writing and ultimately fulfilled. Let the publisher representative know your expectations and what reasonable course of action you will take if he or she is unable to deliver on those promises — i.e., "Until our payments have been applied correctly to our account, we will hold any future orders."

AALL and CRIV resources. Finally, keep up with developments in other law libraries and in legal publishing that may affect how accounts and collections are handled. Attend professional meetings. Seek out your acquisitions colleagues to compare notes on how things are going. Stop at the vendors' booths in the Exhibit Hall. Though they should not be your first tool in problem resolution, monitor and participate in listservs, such as law-lib, PrivateLawLib-L, StateCourtCountyLawLib-L, ALL-SIS and LawACQ. Thanks to our colleagues' willingness to share information on the listservs, we are alerted to new problems and solutions, often before they surface in our own libraries.

Check out the resources that have been brought together on the CRIV's Web site, including the CRIV Tools designed to offer practical help with a wide range of acquisitions and vendor-related problems. And, if for any reason you are not able to resolve a vendor dispute, the CRIV Mediation Subcommittee stands ready to help with its resources and expertise.

Request for Mediation: Committee on Relations with Information Vendors

Note: Prior to filing a request for mediation, individuals are expected to have made a reasonable attempt to resolve the issue at hand. To avoid duplication of effort, please provide a complete account of your efforts to communicate with the vendor. Copies of notes from conversations with the vendor would be helpful.

Date: _____

Nature of problem: _____

Name: _____

Library: _____

Address: _____

Telephone number: _____

Fax number: _____

Vendor: _____

When the problem was first reported: _____

Send this form and supporting documentation to :
Stephanie Edwards, Mediation Subcommittee
Roger Williams University School of Law
10 Metacom Avenue, Bristol, RI 02809-5171
fax: 401/254-4539

Alternatively, you can complete the form online at:
<http://www.aallnet.org/committee/criv/mediation/requestform.htm>.