

**American Association of Law Libraries
Committee on Relations with Information Vendors**

**REPORT: CCH Reverse Site Visit
Overview & Part I**

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In the recent years, as part of its goal to improve communication between law publishers and law libraries, CRIV has visited several law publishers. Now CRIV also invites publishers to visit local law libraries, and these activities are called "reverse site visits". Through these visits, the publishers hope to understand better the different needs of varying law libraries and how they can help us serve our patrons better. In May 2000, BNA visited the Virginia law libraries, and this fall CCH visited several law libraries in the Chicago area.

Part I

On Monday, October 30, 2000, CCH staff visited the University of Chicago D'Angelo Law Library. CCH, Inc. was represented by Leslie Bonacum, CCH Law Librarian Liaison; John Falk, Product Support Assistant Manager; Barbara Johnson, Account Administration Manager; and Mike Swiney, Head of Customer Service Product Support. They drove from CCH's north side office to Hyde Park in the south side of Chicago, where the University of Chicago is located. Lorna Tang, Head of Technical Services, at the D'Angelo Law Library, coordinated this visit with Leslie Bonacum. The other D'Angelo Law Library staff who participated in this visit were Judith Wright, Law Librarian; Bill Schwesig, Anglo-American Law Bibliographer; Julie Stauffer, Head of Acquisitions & Serials; and Pat Sayre McCoy, Head of Cataloging.

Before the visits, CCH staff informed the law librarians that they were interested in learning more about the receipt/product process, accounts / billing, and the invoice renewal process in a law library. Therefore, their visit to the D'Angelo Law Library began with a review of workflow practiced in this academic law library. Two flow charts were prepared by the D'Angelo Law Library staff, one on the "life of an invoice" and the other on the "life of a loose-leaf update". At D'Angelo Law Library, an invoice is first approved by the law library staff, then processed by the University Library, and often in the third week, a check will be issued by the University Comptroller's Office. When a looseleaf update is received, the library staff searches the integrated library system to see if it can be checked in. If everything goes smoothly, the update will be filed within two to three days of receipt.

The D'Angelo Law Library staff raised the question of how to replace old transfer binders from the 1960's. CCH staff explained that this represents a special order and requires special attention at CCH. D'Angelo Law Library staff also wished to add a customer's P.O. numbers on invoices and also on renewal certificates. From the conversation, we realized that the D'Angelo Law Library staff did not know about some new services available from CCH Customer Service. How to "market" new or improved customer service to law librarians was briefly discussed. To provide customer service news on the publisher's homepage or to issue occasional email messages to customers are two of many possibilities.

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After the meeting, the library staff demonstrated how checking in an update and processing an invoice were done in the D'Angelo Law Library. This visit ended with a tour of the Law Library and a lunch at the University of Chicago Faculty Quadrangle Club.

**CCH Reverse Site Visit Report
Part II**

On November 2, 2000, four senior level staff from CCH visited the Katten Muchin Zavis Library. CCH, Inc. was represented by: Jerry Pruitt, Vice President, Customer Service; Mike Dorociak, Manager, Order Management; Deborah Arslanagic, Asst. Manager, Order Management; and Leslie Bonacum, Law Librarian Liaison. The participating Katten Muchin Zavis (KMZ) personnel were: Susan Siebers, Director of Library & Information Services; Betty Roeske, Technical Services Librarian; India Strickland, Library Assistant; and Nancy Machura, Library Assistant.

On this visit, CCH's goals were to discuss CCH product content/functionality, as well as processing and billing issues. KMZ personnel had volunteered to host the site visit, hoping to assist CCH by demonstrating and explaining the shipping and billing issues.

The visit began with an explanation of the KMZ processing procedures for checking in looseleafs. KMZ personnel indicated that CCH's decision to switch to white envelopes for their looseleaf mailings slowed down the sorting process. CCH personnel explained that they had switched to the white envelopes to place more emphasis on these mail pieces in mailrooms for large companies and business centers. Too often, the formerly used manila envelopes were perceived as "junk mail" and received low priority in processing.

There was then a discussion of preferred options on how claims were processed. KMZ personnel explained why they preferred to phone Customer Service as opposed to using the webpage. A discussion ensued on what KMZ staff would like to see on the webpage to make it more user-friendly --- a way for the shipping address to be automatically inserted and a drop down menu to select the title. This proposed format would reduce the amount of typing required from the user. In fact, the only actually typing would be specific information about what is needed --- missing pages, replacement binders, etc.

Since CCH has merged NILS Publishing Company into their organization, a discussion ensued on how those filings arrive. For those who are unfamiliar with the NILS/CCH action, NILS' offices will remain in California with their own editorial and support staff, but NILS Customer Service and Order Management will be merged with CCH. It is difficult in the present system to separate the filings when several are sent in one envelope. CCH personnel responded that this practice will change soon, resulting in each envelope containing only one release. The no-charge invoice/packing slip that is enclosed with each filing was also examined by CCH personnel. KMZ personnel could see no value to including this in the package and would prefer a simple packing slip. CCH personnel will determine what its purpose was supposed to be.

The next discussion was a close examination of the existing CCH invoices. Fields that were either not necessary or which caused confusion for our accounting system were

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discussed. Someone asked whether it was possible to have the invoices sorted by title rather than the initial date of the order.

The IVR (Interactive Voice Response) system was demonstrated, and KMZ staff emphasized the difficulties in accessing the system. Once the user obtains access, some of the options were not clearly labeled on the initial prompt menu. Once the user chooses the prompt, s/he realizes that there were additional options available that were not indicated on the initial prompt menu. The only suggestion to improve the system was to enhance the initial prompts to reflect accurately all available options.

KMZ then pointed out problems with the Labor sets. Binders were too full to properly use, because the transfer volumes and/or case volumes were not being received in a timely fashion. Two calls to Customer Service to determine when either a case volume or a transfer binder would be produced resulted in two different answers. CCH indicated that the production schedule will be investigated and that management would determine how a Customer Service Representative obtains information that s/he passes onto the client. Shortly after the meeting, CCH did contact KMZ with the information that the editorial staff had already discovered the problem and have implemented a new workflow which should prevent these types of problems from recurring.

KMZ next stop took them to the Standard Federal Tax Reporter. The labels sent from CCH did not adhere properly. Examples of other vendors' binders were produced and discussed as alternatives. CCH acknowledged the problem, and indicated that they have already switched to a new adhesive, which they believe will solve the label issue. There was also a discussion about the difficulty of determining each year which release is the last release. The new contents arrive in mid-December but sometimes it is late December before we can verify the release date.

KMZ personnel's closing remarks emphasized that CCH does not create very many problems in this library. It was felt that CCH was extremely responsive to correcting editorial errors as soon as it was contacted. If the Customer Service personnel can be consistent in their answers on when case volumes, final releases, etc. are going to become available, the number of calls from libraries would decrease.

KMZ staff felt that it was a productive meeting for them. It was appreciated that the CCH personnel took the time to participate in this site visit, took copious notes and already have followed up on many of the issues raised. KMZ personnel were willing to have additional dialog in regards to NILS or other issues at a later time.

**CCH Reverse Site Visit Report
Part III**

On November 6, 2000, CCH visited the Allstate Insurance Company Law Library. CCH staff who participated in the visit included Becky Hall, Customer Service Team Leader; Terry A. Hofer; Order Management Assistant Manager; Barbara Johnson, Account Administration Manager; and Mike Swiney, Head of Customer Service Product Support. The Allstate Insurance Law Library staff who hosted the visit were Corinne Roth, Law Library Specialist; and Dahlia Saleh, Law Librarian. Lorna Tang

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from the University of Chicago was also present at the visit to provide support and to take notes.

The visit began at 9:00am at the Allstate Law Library in Northbrook, IL. It started with a meeting to discuss special concerns of the law library staff. The law librarians particularly wished to obtain selected printed products at a reasonable rate in addition to the corresponding Internet service. Currently, they subscribe only to the Internet services. The library needs bound volumes to complete the printed set and also needs the printed summary sheets to route to the attorneys who need them. At present, the library staff prints out the summary sheets from the webpage and routes these printouts.

The librarians and the CCH staff then moved to discussing the various advantages and disadvantages of claiming by telephone and through the CCH homepage. CCH's webpage usually provides confirmation, but the library staff does not always have the page open for claiming purpose. Librarians also want more titles made available through standing orders. Further, if there are too many sheets for a single binder to hold, additional binders should be sent automatically. Allstate pointed out that, for corporate libraries, CCH's tax I.D. needs to be clearly printed on each invoice, and the sales tax needs to be clearly identified for each title.

Since CCH is taking over NILES, the National Insurance Law Service, the law librarians were very concerned with the integration of operations between these two companies. For example, NILES sends invoices out with their product while CCH sends out invoices separately. For some law library customers, the sales tax is now applied for the first time to the NILES publications since CCH has offices in all fifty states. Each state also has its own rules and regulations on sales tax of the CD-ROM products and Internet products.

The visit ended with a demonstration of the update check-in and invoice processes at the Allstate Insurance Company Law Library. A tour of the Library was also given before the guests left the Law Library shortly before noon.

**CCH Reverse Site Visit Report
Part IV**

On November 29, 2000, three CCH personnel visited the William J. Campbell Library of the U.S. Courts. CCH, Inc. was represented by: Jerry Pruitt, Vice President, Customer Service & Operations; Mike Dorociak, Manager, Order Management; and Sean Sieczka, Team Leader, Product Support. The participating Court personnel were: Siew Kie Walsh, Technical Services Librarian; Sonja Nordstrom, Serials Librarian; Barry Herbert, Deputy Circuit Librarian; John Klaus, Government Documents/Reference Librarian; Claude Hayes, Cataloging Technician; Kevin Vinson, Serials Technician; Eraina Simpson, Acquisitions Technician; and Denise Adams, Acquisitions Technician.

Siew Kie Walsh explained that the Seventh Circuit consisted of seven libraries in three states. The library staff are also responsible for the judges' chambers copies of materials. They use a centralized purchasing system for their circuit. The national centralized purchasing system was disbanded in 1998.

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Sonja Nordstrom did a demonstration of how their SIRSI Unicorn system handles the check-in and processing of releases. She also illustrated how staff create records to handle the problem of the case volumes or other transfer volumes having a different name from the looseleaf service.

Monthly prediction for product mailings is a problem for library staff. They would like this to be standardized to make processing simpler. CCH noted that for more frequent publications, such as weekly services, the issue date is predictable. The same does not hold true, however, for monthly publications. With monthly services, CCH tries to capture as much new information as possible in every report so readers do not have to wait a month to hear about a new development that happened at the end of CCH's coverage cycle. If something significant is about to happen, such as legislation is about to pass, the publication may be held a day or two to ensure CCH covers this important new development in a timely way. When asked if CCH could then just cite a month, rather than date and month, they replied that they cannot. US Postal Service periodical regulations require CCH to put a day and a month on the update.

Claims are done via the phone by the check-in personnel. The Serials Librarian would use the web to claim.

Staff suggested improvements to the web site:

1. At the present time, no response that request has been received. If auto response was activated, it would be used more.
2. Account numbers need to be automatically generate shipping information.

A review of the court claim system was discussed. CCH requested that the Account number be included on purchase orders. Otherwise, the system should work correctly.

They also pointed out problems that the 3rd, 4th, and 7th Circuit Libraries all have:

1. Centralized purchasing means that "bill to" information may not correspond to the numerous "ship to" information. Renewal notices should all be sent to the Chicago address (the "bill to" address) and not to the judge.
2. Renewal notices contain all of the "ship to" addresses. CCH indicated that the present system only allows for one entry.
3. Bring all renewals to the same expiration date. CCH personnel indicated that this request can be accommodated and CCH will work with the staff to accomplish this goal. The only products that cannot conform to the "same expiration date" requirement are the Standard Federal Tax Reporter and Tax Guide sets.

The following issues were also raised and addressed:

1. Unemployment Insurance, a print subscription, is no longer available as a new subscription. Because of this, the library has been unable to get some missing

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releases. CCH will work with the staff to obtain the missing releases to date. CCH will continue to support existing print subscriptions.

2. CCH has NO plans next year to cease the print publication of any of their present products.

3. U.S. Master Tax Guide is still a valuable publication for CCH.

4. For CCH, print products still produce 50% of their revenue, and they intend to support print products for some time to come.

5. Options on what they could do with the present invoicing system were discussed. Siew Kie inquired whether they can get an indication of all copies. CCH said it is possible to do.

6. Many CD ROM customers will probably migrate to the Internet.

7. If errata sheets are sent, how should they be distributed? Information could be available via the web, and CCH will investigate this possibility. If CCH sent the notices in print form, the suggestion was to make them different from the enclosed ads, so that filers could be instructed to give that particular piece of paper to a designated library personnel.

8. No plans to discontinue the Bankruptcy Law Reporter, as a stable user base continues to subscribe.

Discussions resumed on how acquisitions are recommended. In this library, there has been no review of the collection since the 1980s by a CCH representative. No flyers or catalogs have been received. CCH offered to send a catalog and a marketing package to them after the meeting.

Library staff inquired as to how CCH decided on new products. CCH responded that they study market research and conduct an evaluation of industry trends before deciding on a new product. Such information can cause CCH to split current products into more specialized products or to create new products.

CCH's online store will have a new look starting January 2001. Based on market demand, CCH Business Units will continue to consider new ways of making content available and alternate pricing models, including transactional pricing, although no decisions have been made to date on "pay for view" content. CCH also indicates that some future products will only be available on the Internet. Library staff suggested that usage of the Internet products might increase if libraries could purchase blocks or time for Internet services, or, alternatively, if CCH could bundle free Internet time/access with existing print subscription.

When asked specific questions about their website, CCH confirmed that there is the ability to see a general description of a product on the site, though, at the present time, tables of contents are not available.

One of the library staff noted that their users of Westlaw.com could not access CCH titles while users of the Westlaw software did have access to the same CCH products.

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Staff wanted to know if this would change in the future. CCH indicated that these types of issues are determined by contracts.

Library staff ended the day with two final issues. The first was an explanation of how cost increases affect the library's budget. The bottom line for the library is that when costs increase, libraries frequently have to cut subscriptions. Second, library staff wanted to know whether or not it was possible for CCH to track all of a library's subscriptions and notify the library when there is a lapse in any given subscription. CCH discussed options with the staff, and a tentative agreement was made that subscriptions could be reviewed several times each year.

Doing Business with CCH booklets were distributed.

Conclusion

The CALL CRIV Committee would like to thank the personnel of the libraries that were visited and the numerous CCH personnel for participating in this reverse site visit project. The unanimous opinion was that these visits provide valuable experience and insight for all participants.

A follow-up report on the progress of CCH in addressing the issues listed above will be published in a later issue of the CRIVSheet.

**Second City Site Visits - CCH Report
Overview & The Process**

Note :The following article contains the report from the publisher about the CCH reverse site visit. The information provided in the article has not been checked by CRIV or AALL, and the article is not meant to be an endorsement of the named vendor or its products by CRIV or AALL.

No new support services to announce, no billing snafu to correct, no system upgrade to explain, no panel to participate on - we were there for one plain and simple reason: to learn.

And what a great experience the library site visit initiative was for CCH INCORPORATED's customer service leaders. Although we keep in close contact with customers throughout the year through individual customer meetings, luncheons, professional conferences and feedback groups, the on-site visits provided us with a unique, first-hand opportunity to observe and understand our customers' workflows, processes and work environments.

The following is a summary of the process followed, as well as some secrets to success, should you be interested in participating in the initiative. Also included is a summary list of most common issues raised, and the changes CCH is considering in response.

The Process

1. CCH formally expressed to CRIV Chairperson Chris Graesser an interest in participating in the site visit initiative.

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2. CRIV confirmed that CCH would be able to participate in the initiative, and assigned Katten Muchin Zavis Technical Services Librarian Betty Roeske and University of Chicago D'Angelo Law Library Associate Law Librarian for Technical Services Lorna Tang as the CRIV project leaders.

3. CCH identified types of libraries and librarians we wished to meet with, as well as key areas of interest, and communicated the criteria to CRIV.

- **Types of libraries:** academic, law, insurance and government.
- **Types of librarians:** including acquisition, reference and technical services.
- **Key areas of interest:**
 - In general: the organization structure of the library and an overview of the responsibilities of the librarians and staff in the organization.
 - Specific issues we wanted to cover included:

a) **Product Processing / Receipt:**

Process for receiving/filing/tracking print reports

Method used to track missing reports

Claim mechanism used for missing reports

Problem scenario relating to these issues

Issues faced with electronic products

b) **Accounts / Billing:**

Overview of workflow for processing a CCH bill.

Common problems encountered and possible process improvements

Determining if a bill has been paid

c) **Invoice Renewal:**

Overview of workflow

Common problems encountered and possible process improvements

- **Other issues:** CCH also asked each site to raise whatever issues they felt were important to them in working with CCH.

4. With our wish list in mind, CRIV identified four law libraries in the Chicago area as host sites and communicated our learning agenda to them.

5. Once host sites were confirmed, CCH worked with the lead librarian at the site to determine schedules. Meetings were scheduled for half-day sessions.

6. CCH identified and communicated to CRIV project leaders and each host site the CCH participants for each meeting, generally limiting the number of CCHers to three.

7. The lead librarian at each site organized agenda and staff presentations to cover areas of interest identified in the CCH wish list, as well as issues of the site's concern as a CCH customer. The agenda and participating library personnel were communicated to CCH in advance of the visit.

8. One of the CRIV project leaders participated in each of the meetings.

9. Following each meeting, CCH issued summary report to the site visited outlining issues covered and next steps.

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**Second City Site Visits - CCH Report
Secrets to Success**

[contributed by CCH, Incorporated]

From our perspective, the following greatly contributed to the success of the meetings and the project overall.

1. CRIV's support

From CRIV leadership's immediate response to our request to participate in the initiative, to Betty and Lorna's identification of appropriate sites; communication with CCH and lead librarians at sites; and oversight of the individual visits, CRIV's support ensured that this initiative was a success.

2. Identification of learning needs

Having the publisher provide a clear, concise identification of learning outcome desired (including types of libraries and specific issues to be covered) helped CRIV identify appropriate sites for visits, as well as set a general, consistent framework for all of the meetings.

3. Location, location, location

From a resource and timing standpoint, visiting sites in close proximity to CCH helped ensure that we could visit several different libraries in a short period of time.

4. Proper identification of resources

It is imperative that both the host site and the publisher ensure that the right people participate. By limiting number of participants to those who have a hands-on role in the process, it ensured that all of the presentations were focused, all of the nuts-and-bolts information got covered and open discussions flowed.

6. Show and Tell

One of the main advantages of being on-site at a library was being able to observe how things are done in the workplace, as well as how CCH product-use issues arise.

At Katten Muchin Zavis, for example, the first hour of our meeting was spent standing in the area where mail comes in and is sorted, CCH updates are routed, and publications are tracked. We learned a lot; for example, the fact that we no longer consistently use yellow envelopes for our mailings causes processing delays for Library Assistant India Strickland, who can no longer quickly and easily distinguish CCH mailings from other materials. Technical Services Librarian Betty Roeske showed us a NILS binder that was about to explode, and peeling Standard Federal Tax Reports labels that had to be secured with mailing tape. (We do have new labels from a different manufacturer this year, which should solve this problem, and the NILS binder issue is also being addressed).

At the University of Chicago's D'Angelo Law Library, Head of Acquisitions and Serials Julie Stauffer presented us with flowcharts following "a day in the life" of an invoice and an update. This was a very effective tool in helping us gain a ready understanding of all of the steps involved, and how certain things CCH could do (such as including the Purchase Order number on the Invoice) could help make the process smoother.

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7. Leave enough time for discussion

What may seem mundane, ordinary or self-explanatory to you, may be something completely new and intriguing to your visitor. Leave lots of time for Q&A.

8. Relax!

I think it's fair to say that everyone was a little nervous at first. Keep in mind that these meetings are really just informal discussions with a common goal of education.

**Second City Site Visits - CCH Report
What We Learned**

[contributed by CCH, Incorporated]

We gained a much better understanding of how each library's unique physical environment and workflows - including everything from office space and process dependencies to hardware and software - play an enormous role in how librarians work with CCH day-in and day-out, and how seemingly small changes by us can either make your life much easier, or cause you hours of extra work.

This led to our most important learning overall.

The fact that each site was so different further highlighted the need for CCH to continue to build flexible systems and processes, where possible. Although we cannot build and maintain systems that are personalized to each customer's need, we can continue to offer alternatives in how services are provided so that customers can work with processes and systems that best suit them.

In some cases, however, our current systems simply do not allow for the flexibility that you desire. For example, one person preferred not to receive any product renewal reminders, while another person requested more frequent notice of expiring subscriptions. The fact is, under our current system we cannot suppress the letters for some customers, and issue additional letters for other customers.

We will, however, keep that and other changes in mind as we continually upgrade systems and implement process changes to better meet our customer needs.

Aside from this overall learning, there were several issues raised that either had potentially broad application, or were raised at two or more sites. A summary of those issues follows here. There also were many issues that were raised that were specific to the individual sites, which CCH is following up on with each site.

1. Tracking CCH product release, as well as product updates, can be difficult. Is there anything that can be done?

- In terms of updates, our weekly and biweekly publications are predictable but many of our monthly products are not. This is due in large part to legislation taking place and the fact that because these are updated monthly we often will hold a report in order to get as much current information out to the customer as possible.
- CCH will explore the possibility of providing a calendar on our Customer Service web site (<http://support.cch.com>), which would provide estimated product ship dates, as well as information on when extras are issued.

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2. Attorneys / professors are not to order products and bill to library. Can CCH put a system in place to ensure this does not happen?

- By request, CCH can put a "comment" on your account to reflect this requirement, and this will curb most of the activity. It is not a foolproof process, however, and some people can still get around it. Please ensure that this restriction on ordering and billing products is communicated at your site, as well, and together we can significantly reduce this occurrence.

3. Sometimes, it is difficult for librarians to understand what products are included as part of their subscription. For example, when a casebook comes in, it may not be clear what publication it goes with.

- CCH will explore if we can put our Customer Service or Fulfillment catalogue on our web site, which would break out all of the components that are included with that subscription along with projected frequency of updates.

4. It would be helpful to have the Purchase Order number included on invoices and renewal certificates.

- If Purchase Order information is provided at the time your order is placed, that information will appear on your original invoice. By calling Customer Service- Billing and Account Administration at 1-800-449-6439 you can request a revision to an existing invoice to include your Purchase Order number.

Unfortunately, we are not able to display Purchase Order numbers on renewal forms. This is something we can consider for future system enhancements.

5. Customers were not fully aware of different service options offered on the Customer Service web site, and requested features CCH already offers.

- CCH will explore making e-mail updates about new customer options available for those who are interested in receiving them and will improve our communication of different service options.
- For services customers are aware of, and choose not to use - such as the Internet Service for ordering replacement pages and reports - CCH will explore site improvements identified by customers (such as reducing the amount of keying-in required and issuing confirmations) that will make such services more effective.

6. Certain customers want to have all subscriptions on a common expiration date to make payment easier.

- CCH can accommodate this by request. Please contact Billing and Accounts Administration: Deborah Arslanagic at 1-800-449-6433 ext. 6328, or Barbara Johnson at 773-866-3152.

7. Certain customers stated that they prefer to have one account number rather than multiples.

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- CCH can accommodate this by request. Please contact Billing and Accounts Administration: Deborah Arslanagic at 1-800-449-6433 ext. 6328, or Barbara Johnson at 773-866-3152.

8. A wide range of NILS issues were raised, from invoice and packing slips issues, to product shipping and maintenance problems with binders.

- This year, certain NILS customer support functions will be integrated with CCH's. As that occurs, CCH will look into the issues raised and address the problems where possible. We are also seeking feedback from you in this area, and would be open to conducting customer sessions to discuss proposed changes. If you would like to participate, please contact: Mike Swiney at 1-773-866-3125.

From the start, CCH believed we could learn a lot by being on-site at different types of libraries to see work in progress. But we learned even more than we expected, walking away with a much better understanding of different library operations and gaining important new insights into the practical effects of CCH processes and procedures on both libraries and day-to-day librarian functions.

On behalf of CCH, special thanks to Betty Roeske of Katten Muchin Zavis and Lorna Tang of the University of Chicago for their assistance throughout this initiative. We would also like to thank everyone who welcomed us into their workplaces and participated in the site visits. They openly shared information and first-hand experiences that are certain to help CCH better understand and meet customer needs in the future.

**Jerry Pruitt
Vice President, CCH Customer Service and Operations**

**Leslie Bonacum
CCH Law Librarian Liaison**