

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

**SUBCOMMITTEE REPORT: CCH/Wolters Kluwer Legal Site Visit Report
October 23-24, 2006**

Introduction

Rochelle Cheifetz
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At the beginning of 2006 I approached Mary Ann Loustaunau, executive director of sales at Wolters Kluwer (WK) Legal, and asked if her company would be willing to meet with the CRIV Site Visits Subcommittee at its headquarters in Chicago. Agreement was quick and enthusiastic. Arrangements for the trip were outlined on the last day of the 2006 AALL Annual Meeting and we were off and running. Linda Lev-Dunton efficiently coordinated everything from the WK side for a visit on October 23-24, 2006.

Prior to the visit, Nina Platt, CRIV chair, sent out an e-mail to the AALL law librarian discussion forums announcing the upcoming visit and soliciting comments and concerns about the family of WK companies and its products. I sent an outline of these concerns to WK. The executives and staff of Wolters Kluwer responsible for the areas of concern made the presentations and were part of the discussions. The accompanying articles by the three members of the subcommittee who participated in the visit address the different components of the information relayed to us by WK.

As chair of the subcommittee, I would like to thank the members of the subcommittee who took time from their schedules for the meeting—Nina Platt and Joan Hounshell—and also then-AALL Executive Director Susan Fox. A big thank you goes to Linda Lev-Dunton and Sheila Dempsey for putting together all the details. The Wolters Kluwer executives who took the time to meet with us were gracious hosts and made sure that the meeting was both pleasant and productive. And in no small measure, a thank you to the AALL members who shared their questions and comments.

Wolters Kluwer Law and Business

JoAnn Hounshell
Chicago-Kent College of Law Library

Company structure

Wolters Kluwer Law and Business provides research products and software for legal and business professionals, as well as casebooks and study aids for law students. Its product lines include Aspen Publishers, CCH, Kluwer Law International, and Loislaw. Its markets include law firms, law schools, corporate counsel, and other professionals requiring legal and compliance information. Wolters Kluwer Law and Business is a unit of Wolters Kluwer based in New York City and Riverwoods, Illinois. Wolters Kluwer is an international publisher marketing to the health, corporate services, finance, tax, accounting, legal, regulatory, and academic sectors.

Sales Organization

Many years ago the CCH sales organization module was broken down by health, tax, legal, and business units, which meant that a CCH customer could have as many as four sales representatives. Overwhelming dislike for this customer service model led to a reorganization and development of a new sales organization structure.

Each Wolters Kluwer Law and Business customer has at least two sales representatives. Law firm customers have three sales representatives. One sales representative is for CCH Internet and Tax

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Research Networks and CCH print titles; a second representative is for tax software products; and the third is for Aspen print titles.

Law schools have two sales representatives. One sales representative supports Legal Professional and Business Compliance products. The second representative sells textbooks for course adoption and builds relationships with faculty, often outside of the library. A complimentary copy of selected textbooks is available. CCH offers discounts to schools that adopt their textbooks for classroom use.

Federal and state government agencies also have two sales representatives. One representative supports the Legal Professional and Business Compliance products and the other supports all tax products.

If you do not know who your sales representatives are, you can go to <http://support.cch.com/findmyrep> or call 800/344-3734 between 8 a.m. and 6 p.m. CT (Monday-Friday).

Aspen Publishers Billing Practices

A recurring concern for customers is the increasing costs of Aspen supplements. Many libraries have found that they can save money by canceling and purchasing a new subscription or update only when it can be determined the supplementation is necessary. In response to the customers concerns, Aspen has tried to hold price increases for supplements to 5 percent to 6 percent annually. The company anticipates that it will be able to hold these price increases at 6 percent during the next year.

Aspen does offer an automatic supplementation program. Enrollment in this program allows updates to be sent to subscribers automatically on a 30-day, risk-free trial basis and billed separately. Subscribers are also able to cancel their participation for any title by contacting their customer service representative.

Customers have also complained of the increase in shipping charges on every invoice. In 2004 Aspen responded to this concern by instituting a policy that the shipping cost would be 8 percent of the cost of the title, but no more than \$25 per shipment. The company plans to maintain this pricing during the next year.

Many customers have requested annual invoicing from Aspen to help them to budget more effectively and reduce staff time in processing invoices. Aspen is currently reviewing options to provide annual billing on selected titles, such as the *Department of Justice Manual* and the *Directory of Federal Court Guidelines*. The company is also working with several government agency customers to provide customized invoicing to meet their requirements.

AspenLaw Study Desk and Teachinglaw.com

Aspen has launched a new integrated software tool called AspenLaw Study Desk. The software allows students to create, organize, search, and display their research on their laptops. Students can organize case briefs, class notes, legal statutes, and other study materials. The software includes briefing templates, flashcard and quiz wizards, an outline management tool, and more. A demo of the AspenLaw Study Desk is available at the Aspen Publishers Web site.

Also new from Aspen is Teachinglaw.com. This is an online, customizable, interactive course book and classroom management tool for the standard first-year legal research and writing course. This product is promoted as a tool not only for faculty but also for the technology-savvy student. Teachinglaw.com was designed and developed by Professor Diana Donahoe, director of legal research and writing at Georgetown University. It is currently in use by 240 students in three

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legal writing classes at Georgetown. Additional information and a flash demo on Teachinglaw.com can be found at the Aspen Publishers Web site.

CCH Tax Reporters

The *CCH Standard Federal Tax Reporter* is well regarded within the legal community as a comprehensive and authoritative tool for tax legal research. New law schools have voiced their disappointment that the *CCH State Tax Reporters* are no longer available as a print subscription, although long-term current customers of the *State Tax Reporters* still receive print updates.

CCH made the decision several years ago to only make this title available electronically through its Tax Research Network. This was a business decision based on the cost of producing the print set and the decrease in the number of new subscribers. Currently, CCH is committed to maintaining print subscriptions to current subscribers to any *State Tax Reporters*, but will not accept new subscriptions.

Special Libraries Association Meeting

Many customers voiced their disappointment that CCH did not send a representative to the tax librarian roundtable at the Special Libraries Association (SLA) annual meeting. The roundtable topic was on essential tax material, print and electronic. The Bureau of National Affairs and Tax Analysts were represented, but there was a feeling that since CCH did not send a representative, it no longer felt that tax is important in the law firm environment.

The bad news is that information about the SLA annual meeting did not get to the right person at CCH. The good news is that CCH is committed to its tax product lines and to meeting the needs of its law firm customers. Law firm customers can expect to see a CCH representative at the next SLA annual meeting.

The New and Improved CCH Internet Research Network

Nina Platt

Nina Platt Consulting, Prior Lake, Minnesota

The Wolters Kluwer (WK) site visit began with a very preliminary demonstration of the next iteration of the CCH Internet Research Network, which will be released in 2008, followed by discussion of the issues brought up about the current CCH products and Loislaw.

During the early stage of developing a prototype for the new interface, WK asked librarians who attended the 2006 AALL Annual Meeting to take a test drive of the new interface. They liked what they heard (all but one person preferred the new design) and took the feedback to heart. The new interface will allow researchers to search selected content, as well as search all content with improvements made to the search results.

While development has been underway, WK has also been planning the migration from the old to the new system. There will be a phased launch strategy with law firms being the last customers transitioned. Subscribers will have dual access for 60 days to allow for a smoother transition, and there will be a heavy emphasis on training. Every effort will be made to bring preferences over from the old system to the new, if at all possible.

At the end of the presentation, the presenter emphasized how good the development staff felt about the interaction and that they will continue to seek out feedback from law librarians. He also emphasized the commitment WK has to technology and innovation.

Current CCH Internet Research Network

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The following issues were discussed based on questions from AALL members.

Pricing is not transparent and movement to firm-wide subscriptions is being forced. WK stated that price levels are set by a correlation of value related to usage (print and Internet). The company decided to move to firm-wide subscriptions for law firms to make the pricing more transparent. It also made changes recently to make corrections to pricing for products that were undervalued and to eliminate concurrent user limits and site licenses.

Additionally, WK started providing multimedia discounts where a discount is provided for the print format if the firm subscribes to the electronic format, with the exception of titles where authors do not allow discounts. For those firms that have had site licenses, they will now be able to move to specific titles without a penalty. WK doesn't anticipate any significant changes to pricing in the near future on the heels of the recent changes.

There is a need for CCH on both Lexis and Westlaw. At present the CCH titles are only available on Lexis with no change anticipated.

Loislaw

Loislaw focuses on serving practitioners in small law firms, while the Internet Research Network (IRN) is targeted to medium and large law firms, law schools, and academic libraries. During the last year WK reviewed the content offerings on both services. Where content is targeted to the mid-large firm segment, the content has been migrated to the IRN. This includes treatise works (e.g., Areeda, Seligman), which are now linked to CCH reporter content. Aspen case law was added to libraries to provide depth of coverage for each library specialty. Treatises that focus on specialty areas typically practiced in a small firm (bankruptcy, construction, and real estate) were retained on Loislaw. In the long term, the goal is for all WK Law and Business content to be accessible (and integrated) through a single interface.

CCH School Internet Library

The CCH School Internet Research Network offers several subscription library options. The CCH Omnitax Internet School Library is a compilation of research materials that include federal and state tax services. Omnitax is intended for use by students, librarians, and faculty. The service includes up to 35 user IDs/IP addresses and five individual faculty IDs.

The Internet titles and integrated libraries of the CCH Internet Research Network are available for individual purchase. While in most cases a school discount is available, there are some products that include treatises which cannot be discounted due to author royalty agreements. CCH trainers are available for free onsite tax research training sessions for students and faculty each semester or quarter. The Internet Research Network also includes an e-mail service to notify subscribers automatically of the latest federal, state, and international tax news.

A signed academic addendum to the standard CCH license agreement is required by the company. CCH's business procedures require the sales representative to contact the customer before the academic addendum is sent. A CCH customer should never receive an academic addendum without prior discussion with his or her sales representative. It is the sales representative's responsibility to work with the customer to resolve any concerns about the addendum.

An explanatory letter should also accompany the academic addendum. Although they require the document, CCH conceded that the language was being reviewed by the legal department, and the manner of delivery was being re-enforced with all sales staff after concern was expressed by customers who had received the addendum by fax without explanation.

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CCH also offers the new law school start-up program. Under this program, a new law school can receive CCH print subscriptions for the first two years at a discounted price. The law school can also receive a discount on the CCH School Internet Library.

Customer Service

Rochelle Cheifetz
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Customer service is the driving force for Wolters Kluwer (WK) and the central mantra of its vision. The company wants its patrons/librarians to consider WK to be their first choice for information, tools, and solutions. WK's aim is to be content-centric, practice-specific, and e-based, but not at the expense of print.

Jerry Pruitt, vice president of customer service/operations (CS-OPS), opened the session with top personnel of his customer service and operations teams represented.

The focus of the CS-OPS strategy is continuous improvement. To that end, the CCH division of WK has created an online customer support site (support.cch.com). Questions often asked (FAQs) are addressed by subject heading found on the left, and a self-service tools menu is available on the right, which allows management of your account (unless, of course, the page has been redesigned since this article was written).

These tools run the gamut from account inventory to Internet IDs to order status to invoices. For the patron who hates being on hold on the telephone and likes getting the answers to her questions independently, this page contains loads of pertinent information.

If you want to "speak" to a customer service representative, the "Contact Us" tab offers the usual telephone numbers and addresses and a chat feature (it works!). The center of the page is used for product update announcements (errors that may have been made, updates, conferences, and courses available).

One of the main components of the site is the Knowledge Base (KB). CCH created an ongoing public KB, which can answer many of the questions and dilemmas presented by customers. Articles are written by customer service personnel and are available to both customers and in-house personnel.

CCH instituted a "MyAccount" enhancement that allows customers to self register on the Web site. E-mail alerts and news that can be customized to each account are enhancements on the drawing board.

Customer service is broken down into subscription account services (SAS), account administration (AA), and product support. CCH's operations are divided between print on demand (POD) and printing and fulfillment.

In-house tools were created for CCH staff that is aimed at increasing customer service. One example is STAR, a log for the call center. STAR measures the service and satisfaction levels of calls. Criteria, such as how long customers are waiting, whether calls result in a resolution, and the speed of resolution, are all analyzed.

The majority of the time dedicated to customer service during the site visit was focused on feedback to those concerns and issues that were presented to Wolters Kluwer by the AALL membership. A summary of those issues and WK's responses is included in the following section.

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Feedback from Wolters Kluwer

Some of the questions from AALL members and the answers from WK have been addressed in the articles written by JoAnn Hounshell and Nina Platt. I've tried to address the other issues that were presented to WK/CCH.

For those institutions that have **multiple divisions ordering from CCH** and found orders not placed by the library being billed to their account, CCH suggests setting up authorizations in "My Account." Only those with authorization can place an order.

From law firms (demanding clientele) there was a claim that **response time was too slow** and that orders for **requested shipping methods were ignored**. WK has a standard policy for shipment. A rush order is shipped out in 24 hours (same day, if order is placed before noon). A standard shipment for books is 48 hours. If 48 hours have passed, CCH will upgrade to priority mail.

During the "season" (end of year), there is a three-day turnaround. If there is a delay in a shipment because the title is out of stock, there should be a call to the customer with an explanation for the delay. If the entry was incorrect, it goes to the company's QA, and the correct item is put on rush basis.

Duplication of orders and/or cancellations not recorded. Sometimes the item is already in the shipping system when the cancellation is placed. How can there be an avoidance of duplications? Suggestions made were that CCH work on a "de-dup" query for its system to weed out duplications. Letters will be sent out for standing orders before being shipped so that separate orders won't be entered while there is a standing order in place. Customers can go online to see all standing orders at <http://support.cch.com/standingorders>.

Invoices will be sent with book shipments—this will be instituted in late 2007.

Regarding **loose-leaf releases not coming in sequence order**, if it happened just once, CCH isn't worried. If it continues, then CCH wants to trace which post office is servicing the library. CCH will work with the USPS to determine if there is a problem at the local postal office. Each supplement goes out when it's supposed to, and delay seems to be happening on the delivery side. CCH has entered into contracts with companies that deal with bulk distribution, and this seems to have alleviated the problem for many. Also, for the occasional missing update, ordering a replacement is easy via the self-service tools, at <http://support.cch.com/rpr>.

Aspen title transferred to CCH and library not notified of the transfer and the subscription lapsed. CCH had a letter go out to all holders of Aspen standing orders. A second letter went out confirming titles of the standing orders on all orders that were active in the Aspen database. CCH felt that everything was transferred in its entirety and checked to make sure that all was included in the CCH database. As CCH had double checked all the lists to ensure a clean transfer, it would like to know if there are any additional instances of this.

Telemarketing when e-mail preferred. A library can have its account flagged that it doesn't want any telemarketing calls or that it wants to be removed from marketing lists altogether. The change will not be immediate because of the way that the lists are generated, but it will happen. Also, CCH will institute a new system, "My Account." A library will be able to control when it is called and for what. If the librarian does get a call, there is no reason not to tell CCH, "Don't call me, send it electronically."

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A particular concern to **county or bar libraries that receive their revenue from monthly disbursements of county fines and fees is the decision several years ago by CCH to discontinue the option for quarterly payments for subscriptions.** More often than not, a county library does not receive lump sum budget allocations and also is not permitted to retain excess funds from year to year. Therefore, cancellation of titles seems to be the only option.

CCH offered a few options. One is flex pay, which is with a credit card but does incur handling fees. A library can opt in and out of the program. Another, more viable solution offered, was to have the title renewals staggered so that a quarter of them would be up for renewal at different times during the year. CCH would be willing to work with the libraries to work out a payment schedule of choice.