

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

**REPORT: Teleconference with West Group
February 19, 2002**

On February 19, 2002, the CRIV chair Sara Galligan and CRIV mediation subcommittee chair Carol Rogers held a teleconference with West Group representatives to discuss the discontinuation and interim replacement of its subscription notices as well as a range of back order and quality issues. West Group's director of librarian relations, Anne Ellis, had previously announced these changes in an open letter posted to various listservs on February 1, 2002. The CRIV requested a discussion to gain further information about these initiatives.

Representing West Group were Anne Ellis, director of librarian relations; Mary Ellen Marlowe, vice president for customer operations; Lori Hedstrom, program manager, librarian relations; Mark Witzany, director of the customer service call center; Kris Keller, director of product and pricing services; Kerri Huncovsky, corporate communications specialist; and Julie Merriam, customer service representative. The CRIV thanks these individuals for their time in responding to questions related to West Group's products and services.

Subscription Notices:

With regard to subscription notices, West Group rolled out an interim shipping notice beginning on March 1, 2002, which will replace the problem-ridden label stock that the company recently decided to discontinue. The interim notice is similar to the pre-Business Systems Initiative (BSI) label notice and will include important BSI information. Discussions will take place shortly to determine a permanent replacement for the labels. In the meantime, the interim shipping notice will contain the following features:

- BSI account number
- Short product description visible through the envelope window
- Detailed, long product description
- Delivery number – used to reconcile shipments with monthly invoice
- Recipient address information
- Quantity and price information

Back Order/ Inventory:

West Group discussed the measures the company has taken to address its back order inventory issues. They have convened a three-pronged task force to correct various problems with back orders, which include inventory control, back order elimination and customer communication components. The overall purpose of the task force is to determine how best to meet deadlines and rectify issues. West Group clarified for us the differences between backlog and back order problem. The backlog problem experienced by customers last fall occurred because available inventory did not get to the customer in a timely manner. This problem was resolved in late November 2001. The back order problem involves customer requests for items for which no inventory exists. West Group is working on an improved forecasting model, internal restructuring and restoring the critical connection between inventory and sales departments so that future demands are adequately conveyed. While BSI has

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

somewhat complicated the matter, West Group hopes to implement a back order plan and have corrective actions in place by the end of March to resolve this issue.

Quality Issues:

The CRIV asked West Group to explain a number of quality issues. These included filing instructions, "revisions in process," and the McQuillan problem.

- **Filing Instructions**

West Group is trying to standardize its filing instructions. They are also tracking continuing errors. Senior management is participating in establishing measures to detect when errors occur, their frequency and how to correct problems. Revised instructions are posted at the West Group Store and in the ServiceNews and Product News online publications, so users may consult those resources to find new filing instruction information. (To access filing instructions at the West Group Store, visit <http://www.westgroup.com>. You must enter a title; once you have retrieved the desired title, scroll to the bottom of the page for a link to the filing instructions.)

- **Partially superseded titles, also known as "Revisions in Process"**

West Group addressed its practice of sending out new volumes, which only partially supersede old volumes. They refer to these materials as "revisions in process" and they involve updates to multi-volume sets when the replacement volumes are released over a period of time. The old volume needs to be retained until the product has been fully revised. According to West Group, this is a practice they try to avoid if at all possible. West Group has received comments and suggestions from customers to improve the updating process associated with these revisions. These include holding revisions and providing supplementation until it is possible to send a complete update; providing a generic spine patch for partially revised volumes that indicate the volume includes partially superseded material; and revising instructions by detailing exactly what was superseded. West Group is investigating these suggestions.

- **Charges for updates and recently received revisions - *McQuillan on Municipal Corporations* revisited:**

West Group sent a Volume 20, 2001 loose-leaf supplement to *McQuillan* subscribers in August and the newly revised Volume 20 in December. The \$186 charge for the August supplement was misallocated, and actually reflected a balance owed on the subscription price of \$777. Realistically, the supplement material should have had a much lower cost, but West Group had only billed \$591 in charges prior to the August release. As for newly revised volumes, these always have a separate cost; thus the charge for the December revision reflected West Group's practice of charging for completely revised volumes. West Group apologized for the timing and the misallocation associated with the August shipment. The overall subscription price increase for *McQuillan*, including the December volume, was about eight percent.

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The CRIV will convene another teleconference call with West Group in late April to obtain a report on the status of the new subscription notice as well as BSI demonstrations taking place among law librarians in several nationwide locations.

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