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**CRIV Website**

[www.aallnet.org/mm/Leadership-Governance/committee/activecmtes/criv.html](http://www.aallnet.org/mm/Leadership-Governance/committee/activecmtes/criv.html)

**CRIV Tools**

[www.aallnet.org/mm/Advocacy/vendorrelations/CRIV-Tools](http://www.aallnet.org/mm/Advocacy/vendorrelations/CRIV-Tools)

**CRIV Blog**

[crivblog.com](http://crivblog.com)

# The CRIV Sheet

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## Editor's Corner

It is with sadness that I introduce the final issue of *The CRIV Sheet* for volume 37. It has been a pleasure to work with all of the authors during the past year. I would like to take a moment to thank the assistant editor, Alexa Robertson, for all her hard work this year. Her help has been invaluable, and I am confident that she will do a great job as editor next year.

I hope that we have been able to continue *The CRIV Sheet's* tradition of covering issues that touch on a wide variety of vendor relations topics from a range of perspectives. It was my personal goal to provide articles by authors in numerous types of law library settings.

In this issue, Mary Matuszak and Andrew White explain how to report technical errors, complete with

instructions from vendors. We also have two first-person pieces that include tips on how best to work with vendors. Cindy Hirsch explores what she has learned as a vendor liaison librarian in a law school setting, and David Whelan provides tips for building relationships and working with vendors.

Finally, I offer another solicitation for contributions to *The CRIV Sheet*. The November 2015 issue will cover all the vendor relations-themed sessions at the AALL Annual Meeting in Philadelphia. If you would like to attend one of those sessions and write a report about it for *The CRIV Sheet*, please contact Alexa Robertson at [arobertson@pli.edu](mailto:arobertson@pli.edu). Our editorial policy is available at [www.aallnet.org/main-menu/Advocacy/vendorrelations/CRIV-Sheet/policy-criv.html](http://www.aallnet.org/main-menu/Advocacy/vendorrelations/CRIV-Sheet/policy-criv.html). Enjoy this issue!

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Liz Reppe Minnesota State Law Library

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## From the Chair

Greetings and goodbyes! As the outgoing chair, this is the last "From the Chair" column that I will write. I have been privileged to serve as CRIV chair, and I want to thank everyone who served this year. Jacob Sayward will be taking over as CRIV chair in July. I am confident he will do a wonderful job.

There are changes coming for *The CRIV Sheet* as well. This is the last paper version you will see. In the fall, *The CRIV Sheet* will become a digital-only publication. Editor Sara Paul Raffel and Incoming Editor Alexa Robertson will ably move us through this transition. They will be working out the details in the coming months. So look forward to seeing *The CRIV Sheet* in your inbox instead of your mailbox!

The AALL Annual Meeting is quickly approaching. As you plan your schedule, please keep CRIV activities in mind. The meeting for incoming and outgoing members (and anyone else interested in attending) is Saturday, July 18, from 4-5 p.m. The Vendor Roundtable will be held Sunday, July 19, from 11:45 a.m.-12:45 p.m. Look for details to be distributed to AALL listservs in the near future.

As always, if you have a vendor relations issue you would like assistance or guidance with, please contact us using the Request for Assistance form on page 8, also available at [www.aallnet.org/mm/Advocacy/vendorrelations/request-assistance.html](http://www.aallnet.org/mm/Advocacy/vendorrelations/request-assistance.html). For more information about CRIV, please visit [www.aallnet.org/main-menu/Advocacy/vendorrelations](http://www.aallnet.org/main-menu/Advocacy/vendorrelations).

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## Technical Errors and How to Report Them

**Mary Matuszak**, Director of Library Services, and **Andrew White**, Research Librarian Law Library, Office of the New York County District Attorney, New York

We all make mistakes. No matter how careful we may be, at some point, some small error will make its way into our final product. And that's okay. To expect otherwise, while admirable, is frankly unrealistic. The important thing is to acknowledge this fact and to make sure that anyone who might

notice an error in our work has a way to let us know about it. This is especially true in the realm of legal information, where minute and exhaustive detail is the norm, and especially in the case of information vendors, where a single error can be reproduced across hundreds or thousands of screens around the world at any given time.

Our experience has been that vendors are generally happy to correct errors when they are reported, but

the best way to submit those reports is not always obvious. So in the spirit of better communication, we have asked some major vendors what their official policy is concerning error-reporting. Not every policy set out below is “official” in the strictest sense, but each one comes **directly from the respective vendor** and will hopefully point you in the right direction should you encounter a technical error in the future.



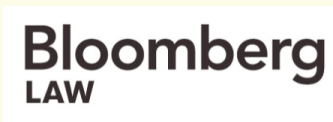
The reference attorneys at 800.REF.ATTY (800.733.2889) will intake and route errors to the appropriate departments.

Librarian relations managers will also relay errors to the appropriate editors and follow up to make sure errors are corrected online.

If a researcher suspects an error in a court decision that did not appear in the original copy, it may be reported to [west.casescarteam@thomson.com](mailto:west.casescarteam@thomson.com).



To submit information on potential errors on LexisNexis online databases, our customers can use one of two methods. First, on Lexis Advance, we provide a “Feedback” option under the “More” tab, which takes users to an input form that can be completed and submitted online. Alternately, for immediate support with an online issue, users can call LexisNexis Customer Support at 800.543.6862. Our Customer Support team of professionals is available 24/7. Either of these methods will direct feedback to the appropriate product manager.



Bloomberg BNA subscribers noticing a possible error in an online or print publication should contact the Bloomberg BNA Customer Contact Center at 800.372.1033 or by email using the Feedback/General Inquiry Online Support Forms via the “Contact Us” link on our website at [www.bna.com](http://www.bna.com). Bloomberg BNA’s policy is to correct factual errors as soon as we become aware of them. Inaccurate material will be corrected online and in print materials at the first opportunity. Factual errors large and small are corrected. A correction notice is then posted as soon as possible after the error is discovered. Correction

notices are clear. They identify the article containing the error and provide a back cite. Minor additions and small corrections to online products may be made without publishing a correction notice. Bloomberg BNA loose-leaf sets will also correct errors but normally do not need to publish correction notices.



We at Fastcase are always eager to correct any errors that may have found their way into the database. We have a sophisticated internal quality-control procedure, but we still are grateful when users point out errors or omissions, problems with citations or missing cases, or other difficulties, which are inevitable in any large repository, electronic or print. It is our goal, when we have found an error or have had an error pointed out, to correct it within 48 hours.



Currently errors can be reported directly to us at [contact@casetext.com](mailto:contact@casetext.com). We evaluate each report before making a change. Eventually, we will also allow trusted moderators from the community to remedy mistakes. Of course, we are also looking for mistakes internally. Our official policy is that we encourage our community to alert us to anything amiss—the “If you see something, say something” philosophy.



We are not a publisher of first instance for cases, so we generally rely on our data partners and court websites to provide corrections. However, we also accept submissions directly from courts and others who are seeking to correct mistakes, and we work to incorporate those as swiftly as we can.



Please do let us know [if you spot an error]. Please include the URL for the opinion, the corrected information, and a source where we can verify the correction.

We’re only able to make corrections to court opinions

that are hosted on our own website. For corrections to academic papers, books, dissertations, and other third-party material, click on the search result in question and contact the owner of the website where the document came from. For corrections to books from Google Book Search, click on the book's title and locate the link to provide feedback at the bottom of the book's page.

Customers can report any errors found in PLI publications directly to the Library Relations team at [libraryrelations@pli.edu](mailto:libraryrelations@pli.edu) or 877.900.5291. We will work with our colleagues across the organization to correct mistakes as soon as possible.

**Cindy Hirsch**, Reference/Access Services Librarian | Elon University School of Law, Greensboro, North Carolina

## Vendor Expectations: Tips and Lessons Learned from a Vendor Liaison Law School Librarian

I started my job as reference/access services librarian at Elon School of Law in February 2013. Part of my role was to be the new vendor liaison. I entered this role with expectations drawn from my previous experience at another law school library. I had observed regular visits from the Westlaw and Lexis representatives who would stop by every month or so. In addition, the representatives would train the librarians on new developments at least quarterly, would offer updates for faculty, and would schedule trainings for the students. The Bloomberg Law representative would check in by telephone or email often and would visit once or twice a year. I also suspected that vendor attention might be tied to *U.S. News & World Report* rankings.

My expectations were pretty accurate for reps from Lexis and Bloomberg Law, but, at the time I started, they were completely off for the Westlaw rep. I am sharing this story in case my experience can help others manage change from their vendor providers. As you may guess, this story has a happy ending (and I learned a few lessons along the way).

Westlaw has undergone change, and I started at Elon during a transition. In fact, I went a full five months without any introduction from our rep, and, all the while, the West student reps (students paid to represent West on campus) had little information and lacked support. There were no student trainings scheduled on the West system calendar and no response to my attempts to reach the representative.

Westlaw has been transitioning law school libraries from Westlaw to WestlawNext, and I had two major concerns. First, WestlawNext had been introduced to our law school, but most law offices were using Westlaw Classic; were our students knowledgeable about the changes and the systems they might encounter when they graduated? Second, as we prepared to teach basic legal research, were we—as librarians and teachers—up to date with all the changes?

Initially I expected our Westlaw representative to address these concerns. However, as we approached six months and a new academic year without communication, we needed a resolution.

Hopefully this situation never happens to you, but if it does, you have options:

- Contact the vendor's regional representative.
- Talk to your peers! You can contact academic vendor liaisons about their experiences.
- Report the issue to CRIV.
- Contact vendor headquarters.
- Use social media.

In my situation, I first worked jointly with our library director to try options 1, 2, and 5, and we were able to obtain results.





For option 5, using social media, I turned to Twitter and received a response the next day (see opposite page).

I contacted the regional library relations representative, who kindly added us to her training schedule even though she was assigned to law firm accounts. We were updated before the start of school.

It took a bit longer for things to work out, but eventually we were assigned a new representative, who, despite having many additional schools to cover, communicates with us on a regular basis. She's explained the recent service cutbacks and expansion of territories. She checks in regularly and responds promptly. Most important for us, she gets answers to tough questions.

West's academic service has changed drastically since 2010, so expectations based on interactions before 2012 are no longer reasonable. Between 2010 and 2013 West was rolling out Westlaw Next, and, as a result, academic libraries received considerably more attention than we are getting now. Frequent in-person training was offered about every two to three months.

Changes in service include:

- The number of schools assigned to each West academic representative has tripled.
- In-person training is being replaced by recorded videos.
- West library relations associates are assigned only to law firms, not law schools.
- "Free lunch" is very limited.
- There is no more swag, student incentive programs, or free printing.

Our Westlaw contract makes up a large portion of

our collections budget. It's fair to expect to be trained to use the product we buy (and to expect the vendor to have sufficient staff to service the contracts). The collective wisdom is that West can get away with service cutbacks because of its market dominance and user preference.

So, what did I learn and how would I approach it now?

- First, reach out to the representative before going over their head. Give them a fair shot to respond. You don't need to wait five months. A week is reasonable if you receive no response.
- Next, contact your representative's supervisor. Don't skip this step. You want to give everyone a chance to resolve the issue locally.
- Talk to your peers. Find out about their experiences.
- Talk to your boss. Prioritize the issue and make a plan, or make several plans. Factor in the unexpected.
- Use social media. Companies monitor social media. Online reputation is valuable. Use Twitter, Facebook, blogs—whatever your preferred medium. Stay within your comfort zone. Request help. Don't be disparaging or mean. Don't use foul language. Expect a response within a few hours (not days, weeks, or months). Be prepared to act on their response immediately.
- Adjust your expectations.
- Think and act holistically, not linearly.
- Don't limit your service expectations to West. Other vendors such as ProQuest are happy, even eager, to provide service with their products.

Our rough patch occurred during a period of big transitions at West. We're happy with our current representative. We are not thrilled with the cutbacks in service, but now we know what to expect.

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David Whelan, Manager, Legal Information Law Society of Upper Canada, Toronto

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## How to Work with Legal Publishers: Tips from the Front Lines

*Editor's Note: This article is adapted from a post published by the author on his blog, O'Faolain, in November 2014.*

Last year, the Canadian Association of Law Libraries (CALL) held a webinar that focused on interactions with legal publishers. I was one of three panelists who discussed working with legal publishers, particularly on negotiations. We also answered many questions submitted by CALL members prior to the session. Following are some of the tips that were offered in the webinar.

### Relationships

My first tip is: buy your own coffee, skip the swag.

It is important to have good working, business-like relationships with legal publishers. Unlike many consumer transactions that may be one-off, librarians working with publishers will do so throughout their entire careers. The legal publishing world is just as small as the library world, so you tend to run into the same people in a variety of places.

We frequently negotiate electronic agreements or buy print materials valued in the hundreds of thousands of dollars (my library's collections budget was more than \$1 million in 2014). If you want to be taken seriously by the people who give you that money, you need to be sure that you are interacting with the publishers in an arm's-length manner.

There is a reciprocal obligation created when someone gives you something. Researchers have found that small things—think of the pens or other special gifts or swag you get at library conferences from legal publishers—can impact your feeling of obligation. The easiest thing is to disengage from collecting tchotchkes or other giveaways from publishers.

I'd never been a big swag collector. As I explained in the webinar, I mostly was on the lookout for envelope openers for my mum, who worked in the acquisitions department of a large academic law library. Sometimes I'd angle for a stuffed animal when my kids were young. I moved from passive to active after Sarah Glassmeyer, director of content development at the Center for Computer-Assisted Legal Instruction in Chicago, started the now-defunct [lisvendor.info](http://lisvendor.info) site. Her post on her own site ([sarahglassmeyer.com/?p=336](http://sarahglassmeyer.com/?p=336)) and the [lisvendor](http://lisvendor.info) site made me realize that I needed to be more thoughtful about this area.

If a vendor wants to meet up with you, have them come to your office. If you're going to meet up with them for lunch or coffee, buy your own. I no longer meet any vendor for a meal, and I buy my own coffee. And skip the gifts and other free things they are offering. You're paying for it in the first place—where do you think the marketing budget comes from? You may end up paying for it a second time if you succumb to the reciprocal obligation.

### **Keep It Businesslike**

I was surprised at some of the questions we were asked during the webinar. It's important to understand that legal publishing is a business. Publishers want to make money. They're not your partners or your colleagues. That doesn't mean you can't be friendly, but, at the end of the day, their bottom line, literally, is financial. If you lose sight of that, your interactions will go off track.

You should be respectful. Don't waste the publisher's time, and don't let them waste yours. If a publisher calls or emails you and a response is called for, give them one. They've got a job to do, and you make it harder if you don't respond. That doesn't mean you say "yes" to whatever they're calling about. You just treat them like you'd expect to be treated if you called and asked a question.

Similarly, don't window shop on their time. If you're curious about something new in the market, do your own research. If you think you're ready to buy or need additional information, work with your account representative. But don't get them involved early to do your footwork unless you're really likely to purchase. They will already have an understanding (or should—see below) of your library and should be able to fill in knowledge gaps that help put the new product in

context. Again, they've got their own internal sales goals, and, if one client is sucking up their time with no chance of a sale, that puts them on the back foot.

The reverse is true too. Don't let them waste your time. Account representatives should understand your library and how it operates. If they don't and they are calling or emailing you about products you don't or can't use, let them know.

The anecdote I shared on the webinar was of a Carswell representative who tried to sell us e-books that relied on the Thomson Reuters Proview app. It's a nice app; not compelling, but clearly designed for a purpose. But it's tied to a user ID, and, in a membership library with 40,000 subscribers and about a dozen IDs, that doesn't compute. Additionally, there was no way to easily lend the e-books to people who couldn't physically come to the library.

It wins the *Tone Deaf Award* for customer relationship management. It didn't help that, in a room with five people in it, he addressed nearly all of his comments to me, *mano a mano*, ignoring the three women in the room. In fact, I was only a decision-maker regarding money; the content decision-makers were also in the room and were not impressed. We're an established organization. If our account contacts don't understand what we do, I expect them to ask. And, frankly, I don't give publisher representatives my time if they do not treat it respectfully.

It gets tricky if you are negotiating a contract and the publisher takes its time. We have had contract negotiations extend more than nine months and into a new fiscal year. I've heard stories of others in even worse spots. Unfortunately, unless you can put yourself in a position of having a single supplier, there is little leverage to getting this time waste resolved. The most successful strategy I have heard of is to call the representative's manager and ask for someone else.

Finally, use data for your decision-making. Know how often books are taken off your shelves and circulated internally or externally. Understand how your electronic subscriptions are being used and by whom. Use that data to discuss whether to keep or weed content from your print collections and your electronic licenses. "Our lawyers want" and "other libraries have" are not sufficiently business-like justifications for keeping or getting content. The question is: does *your* library need it? And data is an effective way to answer that question.

### **It's About You**

You should know in advance what your negotiating position is with the publishers. What do you want? More importantly, what is the worst-case scenario that you can live with? If you haven't thought these things through, your negotiations may meander into

a place from which you find it hard to extricate a positive outcome.

***I don't want the world. I just want your half.***  
**–They Might Be Giants**

If you have not gone to a single source for electronic resource, the worst-case scenario is typically still going to involve an agreement. Where you can, shift to a single source so that you can compare offers and make a selection. That enables you to walk away from a negotiation that isn't meeting your requirements.

Don't get caught up in worrying about what the publisher is getting. There is a concept called "leaving money on the table" that has never jibed with me. If you understand what you want and are willing to pay to get it, that's between you and your budget. I might be willing to pay more or less depending on my own expectations. If you have thought about your position in advance and you achieve it, that's a successful negotiation for you. If the publisher gets what it wants, then it's successful all around. If the negotiation is combative and one side doesn't get what it wants, you can be sure it will attempt to get it the next time around.

**Change is Good**

My last tip shared in the webinar was that changing the discussion is good. Libraries often complain about the annual rate increases in their content packages. If you continue to buy the same thing, then the discussion will only center on how much it cost last year and how much you're going to pay in the next year. If you want to have a different discussion, then change the conversation. One way I try to do so is to

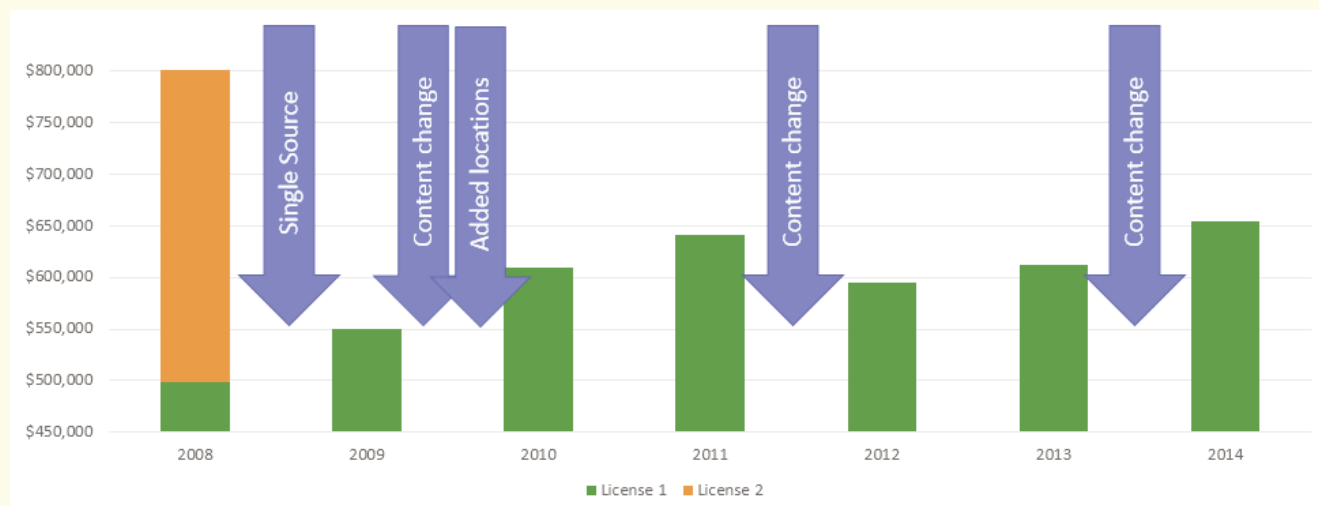
closely monitor what is being used and what isn't and renegotiate the content as frequently as I can. When you start talking about different slices of information and swapping in some and swapping out others, you're no longer just talking about price increases in lockstep. You may still experience an equivalent percentage increase, but you will be fine-tuning your collection. What legal professionals use changes, and you can adapt to those changes.

The chart below shows real subscription costs over time while going from two providers to one and then making content and other changes to keep to a 3 percent annual growth while tailoring resources closely to use.

The chart shows how I did this with one subscription after moving to a single source. Sometimes the change meant I was paying more overall, but I was also getting more content and access. It also shows that, while there is a progression up, it is not a straight line. Over seven years, the content set has been closely tailored without either going in lockstep on price or just adding things on and seeing the cost jump accordingly. We may be at the same dollar cost after seven years as we would have been under a 3 percent lockstep, but we have had savings over that time as well.

It's not all me. The publishers have been creative in meeting our changing expectations and understanding our budget limitations. The change, I think, helps us to find ways to take advantage of changes in what and how they are selling.

The webinar was a fun experience—it's always nice to work with new people—and the two dozen attendees from the U.S. and Canada hopefully learned something useful.



# Request for Assistance: Committee on Relations with Information Vendors

*Note: Prior to filing a request for assistance, 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 are helpful.*

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Library: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Vendor: \_\_\_\_\_

Nature of problem: \_\_\_\_\_

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Please send this form and supporting documentation to:

Liz Reppe  
State Law Librarian  
Minnesota State Law Library  
Room G 25, MN Judicial Center  
25 Rev. Dr. Martin Luther King Jr. Blvd.  
St. Paul, MN 55155  
651/297-2089  
liz.reppe@courts.state.mn.us

You may also complete this form online at:  
[www.aallnet.org/mm/Advocacy/vendorrelations/request-assistance.html](http://www.aallnet.org/mm/Advocacy/vendorrelations/request-assistance.html)