

# Librarian-Vendor Relations - Best Practices

Adapted with permission from [AALL's CRIV](#). Last updated March 8, 2017

## General Guidelines

1. As a general rule, keep a record of all pertinent communication and correspondence.
2. Keep a file of [sample letters](#) on file.
3. Familiarize yourself with the [company's policies](#) (terms and conditions of sale, FAQ, customer service, online forms).
4. Written correspondence tends to get more satisfactory results than phone calls.
5. Consider maintaining a publisher log. A publisher's log is a master record of conversations, correspondence, and decisions made in regard to a particular vendor situation.

## Guidelines for Reasonable Attempt at Resolving an Issue

1. Review all facts and in-house activities. This includes library and accounts payable records and the recollections of library and accounting staff who have worked on the matter.
2. Gather all documentation and use it in your communication. Have account and invoice numbers readily available.
3. Use at least two forms of communication. Contact your local sales representative or talk to customer service. Follow-up your call with a letter by mail, by fax, or by email. Include a confirmation request inside your written follow-up.
4. Address your correspondence to a specific individual or position title. Try to determine the name or position of the person in the vendor's organization most likely to be able to solve your problem.
5. Keep the tone of the communication objective and professional. Resist the temptation to be personal or sarcastic; establish the facts and desired outcome.
6. Keep copies of all correspondence, including email, with the most recent on top.
7. Take notes on all phone conversations with customer service reps and sales reps. Develop a standardized form to note down the date, time, the name of the rep, questions asked and answered, and any promised action.
8. Allow for some reasonable time for a company to sort out a problem. Two weeks is not unreasonable unless the problem requires immediate attention or it has been unresolved in the past.
9. Recognize the possibility that correspondence may get lost (see "Using at least two forms of communication" above) or simple human error may occur.
10. Set up a reminder (in your calendar or email) to follow-up on the issue.

## **Unresolved or Unsatisfactory Results: Next Steps**

1. If the issue is unresolved or not to the library's satisfaction, the purchasing librarian should determine whether this is a unique situation or whether it is occurring in other libraries.
2. Raise the issue informally during network activities with other libraries or at regional association meetings.
3. Send a message to CALL members. Establish a consistent subject entry.  
Example: Subject: Vendor fact-finding: (vendor's name)  
Body of the email should have the following:
  - Description of the issue
  - Status or outcome of the issue
  - Question to CALL members
  - Reminder option to reply off-list
4. Reply to those responding to email and if issue warrants VLC intervention, request permission to include their responses to the VLC follow-up request.
5. If purchasing librarian receives sufficient responses with similar situations, he or she will initiate a formal request to VLC for assistance/action.

## **Request for Assistance to VLC**

A formal request for VLC intervention should include the following information:

- Your name
- Your organization's name
- Your address
- Your telephone number
- Your fax number
- Your email address
- Name of the vendor with whom you require assistance
- Publication format (print or electronic)
- Brief description of the issue
- Summary of the actions taken

The above information, along with any relevant supporting documentation, should be sent to: [Chair, CALL/ACBD Vendors' Liaison Committee](#).

## **VLC Action Plan**

Upon receipt of a formal request, the VLC will:

- Review the request and acknowledge receipt
- Contact the librarian for clarification, if necessary
- Initiate contact with the vendor
- Suggest possible or preferred outcome to vendor
- Communicate with CALL members, if necessary, to validate issue

- Determine if there is a need to escalate to a higher representative within the organization
- Communicate vendor response to CALL members
- Lesson learned? Add to VLC best practices

### **Role and Mandate of VLC**

The role of the VLC is to assist CALL members in resolving disputes with vendors and attempt to attain a fair outcome. The committee monitors issues and trends within the library community and may develop projects/documents or initiate contact with vendors to proactively address issues as they arise.

VLC Mandate: Investigate complaints brought forward by members, initiate appropriate follow-up with the vendor, and communicate outcomes to the general membership.

Example of issues requiring VLC intervention:

- Removal of files
- Unreasonable shipping & handling costs
- Insufficient new content to warrant a price increase
- Late deliveries

# Appendix

## Sample Letters

- [Sample letters from AALL](#)

## Selected Links to Company Policies:

- [Emond Publishing FAQs](#)
- [Emond Publishing Sales & Return Policies](#)
- [Government of Canada Publications FAQs](#)
- [Irwin Law Returns Policy](#)
- [Irwin law Shipping Information](#)
- [LexisNexis Canada Terms & Conditions](#)
- [Thomson Reuters Terms & Conditions](#)
- [William S. Hein Returns Policy](#)
- [William S. Hein Claim Policy](#)
- [Wolters Kluwer Terms & Conditions](#)

## Vendor Relation Resources

- [CRIV Tools](#) from the American Association of Law Libraries Committee on Relations with Information Vendors
- [Customer Service Tip Sheet](#) from the Toronto Association of Law Libraries Publisher Liaison Committee