



LexisNexis®

# BEST PRACTICES FOR A SUCCESSFUL DIGITAL LAW LIBRARY

Significant library cost increases<sup>1</sup> have prompted law librarians to take a close look at their collection management. In the face of mounting pressures, many have adopted new ways to manage resources—for example, reducing physical space requirements by migrating catalog titles to eBooks. This helps manage cost while ensuring that books are up to date and accessible from anywhere. Many readers appreciate eBook formats that make it easy to add notes, highlight text and even link from citations to statutes, cases, treatises and other materials.

Approaches to digital migration depend on specific needs and circumstances.

- **Incremental:** Some organizations have an ongoing preference for printed volumes and offer eBooks for just a select portion of titles.
- **Accelerated:** Others place more emphasis on mobility or are concerned about the administrative overhead that comes with physical books; they may choose to replace a large percentage of hard-copy volumes with eBooks.<sup>2</sup> According to the 2015 ABA technology survey, one third of lawyers report using legal eBooks for work.<sup>3,4</sup>
- **Holistic:** Either way, many libraries are combining eBooks from multiple publishers in a single digital resource that also provides analysis tools to measure usage.

In any of these scenarios, even beneficial change can bring challenges related to technology, communication, training and user adoption—collectively, change management. Good planning and a clear onboarding process can help you prevent issues, overcome challenges and drive a successful migration.

Over the past several years LexisNexis has worked with some of the largest law libraries in the world to implement and launch installations of LexisNexis® Digital Library. The team leading this work includes LexisNexis Digital Library Engineers John Chatelaine and Damian Burns, as well as LexisNexis Solutions Consultant Franz Haux—each with 20-plus years of experience assisting legal publishing and research customers, including law librarians.

Through this experience, the team has developed best practices for success in a digital library transition. Chatelaine, Burns and Haux recently sat down with us to discuss insights on what makes a successful implementation—including project planning, measurement and user engagement strategies.

#### **MODERN CHALLENGES CALL FOR A STRATEGIC APPROACH**

In recent years, libraries have been dealing with budget reductions,<sup>5,6</sup> physical space constraints, increasing demand for mobile access, the need for more efficient research, management reporting requirements and staffing changes. Addressing these challenges effectively through eBooks and a digital library requires a strategy with specific objectives.

Developing that strategy can be part of your digital library onboarding process. As that transition begins for LexisNexis customers, members of the digital library team invest time listening carefully to what each customer needs to accomplish, exploring concerns and suggesting ideas. For example, librarians may need help justifying expenditures or demonstrating the utility of the library.

LexisNexis Digital Library engineers and solutions consultants help customers to determine:

- What to expect
- What to plan
- How to track user adoption and checkouts using OverDrive® Marketplace™<sup>7</sup>
- How to use these stats to justify future purchasing decisions and track digital program progress

The LexisNexis Digital Library team also provides training sessions for administrators and end users.

“Today more organizations look at librarians as project managers, as content curators, as professionals who help someone find the answer they need,”

says Chatelaine, “We work with the technology team to build the library for each customer, but then we really work with the librarians to apply the solution.” Close communication between digital library engineers and individual customers enables the product team to rapidly refine the digital library configuration to meet specific customer needs.

“We develop a rapport with each customer,” says Burns, “and they really appreciate a quick response to any question they have—a service level that may stand out as different from their experience with other companies.” With the premium support that all LexisNexis Digital Library customers receive, engineers, solutions consultants and customer support respond to customer inquiries quickly—generally within a day and sometimes within an hour.

Burns adds, “I enjoy the interaction with librarians, really learning how they look at the materials we offer and how they integrate those in their daily activities. In a conversation with law firms, you really need to explore workflow, which involves integration with their catalog system. That’s a significant forward-looking component to the digital library.”

Says Chatelaine, “We’re most successful when there is a champion in the firm or organization who is going to be engaged and has a vision of what is to be accomplished.”

Once they identify the organization’s champion, digital library engineers and solution consultants encourage that individual to promote the program’s success by:

- Identifying what motivates stakeholders in their organization
- Making sure that engaging communication about the digital library conveys what each stakeholder group needs

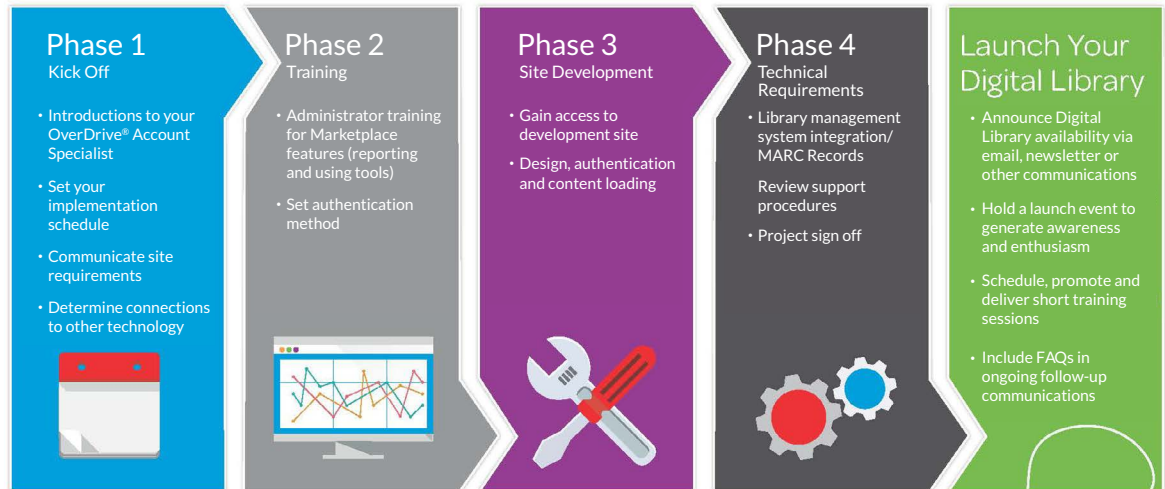
Within each customer organization, an additional individual usually serves as overall program manager. That person is at the center of the solution, connecting the two organizations for an optimal implementation.

That program manager relies heavily on the digital library engineer or solutions consultant to address specific needs and connect LexisNexis professionals involved with the solution—from the technology team to editorial resources and account representatives. Says Burns, “The customer and our management are both relying on us to manage LexisNexis team members effectively and efficiently.”

## PLAN YOUR TIMELINE

Onboarding all or part of your collection to the LexisNexis Digital Library involves five key phases within a timeline that adapts to specific customer needs and implementation goals.

## Timeline



A standard implementation requires four to six weeks. The timeline may be adjusted for more complex technical requirements. An integrated implementation involving multiple systems may require 12 to 14 weeks.

## BUILD USAGE AND ADOPTION THROUGH AWARENESS AND TRAINING INITIATIVES

Even with an intuitive digital library solution, a successful plan needs to include initiatives that:

- Build awareness of the offering and its benefits
- Train people to access and use it, whether they are in the office or off site using a mobile device

### CONVENIENT ACCESS TO YOUR DIGITAL CONTENT

*LexisNexis Digital Library provides access to the largest collection of authoritative legal eBook content—more than 3,000 titles—on a variety of major mobile devices and desktop platforms. Your firm or organization can:*

- Take advantage of the only publisher-neutral legal lending platform
- Share eBook titles among multiple users
- Purchase eBooks centrally
- Manage your library more efficiently via one central, electronic platform

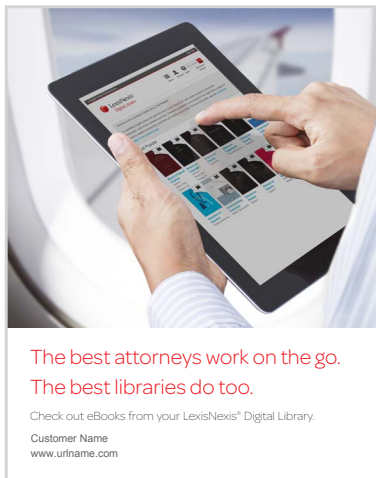
“It’s important to help customers understand how important awareness and training are in driving usage and adoption,” says Haux.

Chatelaine adds, “Every culture is different. You have to tailor training and awareness to the organization and explore how they would like to proceed and really work with the change management process.”

#### **BUILDING AWARENESS**

Ongoing communication helps users understand the benefits of LexisNexis Digital Library and convenient ways to access it.

Digital library engineers and solutions consultants can share examples of posters (see example, below), an email template, online messaging and customized eBook downloading instructions, which may include login information. They can also demonstrate how easy it is to use the Read (in-browser reading) feature for those who prefer online reading vs. an eBook download.



An awareness plan should include repeated communication through various channels such as practice groups, intranet or portal posts and special launch events like an open house. *Read about a plan that worked well for one organization.*

Another option that some customers have found very effective is simply adding popular titles like John Grisham’s books or business books from the broader OverDrive collection. “Our customers find that this drives awareness and use because

the digital library is no longer ‘just a work tool’ ... users receive incremental and personal value,” says Burns.

Organizations that keep their digital library link in a conspicuous location on portals and websites also tend to have higher adoption and usage rates. “We recommend that customers put a link to the digital library in a very visible, easily accessible location on a library home page—and a little promotional message with it also can help,” says Haux.

The digital library engineers and solutions consultants can compile usage statistics and make librarians aware of trends. “This helps them see where adoption and usage was underperforming and how they can manage change and add training to improve adoption,” says Chatelaine.

## TRAINING TACTICS

It's important not to underestimate the importance of showing people how to get started. "Clearly show them how to actually get to the digital library—where to find it, how to access it and how to authenticate," says Haux. "If customers don't know how to do that, they won't use the product. It's that simple."

After that, be sure to remind people of those how-to steps periodically. Many lawyers have relied primarily on physical books for years or decades. Getting accustomed and developing a preference for eBooks can take time. As documented as far back as 1947 with Kurt Lewin's change management research,<sup>8</sup> adoption happens in multiple stages involving:

- Reduction of forces that maintain the status quo
- Developing new behaviors *and, in time*
- Crystallizing that change

When organizations transition to a digital library, usage and adoption patterns can reflect those stages—rising initially, then vacillating until support and enthusiasm for eBooks starts to steadily increase.

Beyond training on getting started, the LexisNexis Digital Library team can provide webinars as well as in-person training for end users or in-firm training teams. Adds Burns, "Most people are used to using a device they personally own. We bring various devices and marketing materials that explain the differences between functionality on different devices, and that can be really helpful."

## RESEARCH: HOW QUICKLY ARE LAW FIRMS ADOPTING EBOOKS AND DIGITAL CONTENT?

In 2012 Bess Reynolds, Electronic Resources Manager at Debevoise & Plimpton, began surveying a variety of firms on their approach to using eBooks. On an ongoing basis, she has been using this research in presentations for professional events like the American Association of Law Libraries conference and law library webinars.<sup>9</sup>

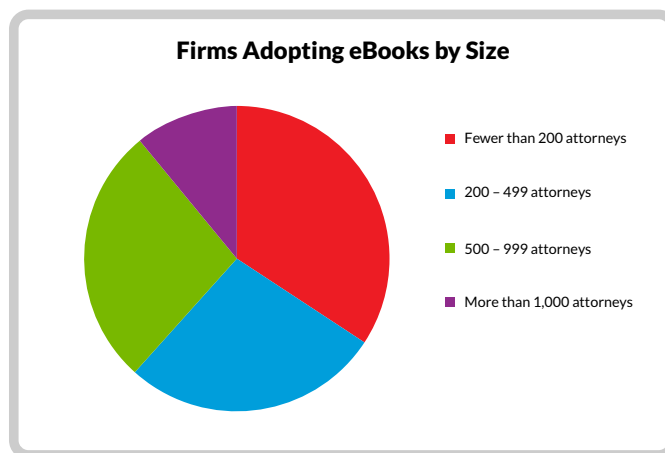
"Everyone's treating digital adoption differently," she noted. "The way we're handling eBooks might be quite different from the way another large firm using the same integrated library system does it."

Nearly 80 firms of various sizes responded to the June 2015 survey. Here are some of the findings:

### 1. FIRM PURCHASES OF eBooks IN THE LAST YEAR

Firm Size	Count	Purchased eBooks	% Yes
Fewer than 200 attorneys	27	13	48%
200 - 499 attorneys	25	11	44%
500 - 999 attorneys	18	13	72%
More than 1,000 attorneys	9	6	67%
	79	43	54%

Among the two categories of larger firms, significantly more than half had purchased eBooks in some manner—whether through an integrated digital library, a one-time purchase or another method. Among firms with fewer than 200 attorneys, 48 percent had purchased eBooks.



With a variety of providers available, the largest number of respondents relied on LexisNexis for eBooks.

## DETERMINING YOUR SAVINGS

As customers continue building usage and adoption, they may need a model to demonstrate savings to their organization. Digital library engineers or solutions consultants can help them access relevant data. The factors in the savings calculation vary by organization based on unique characteristics. For example, an organization that owns a facility won't treat square-footage savings as a significant factor, while an organization about to move to a new, smaller lease space will most definitely factor that in, as documented by Kay Scholer in the LexisNexis case study *Kaye Scholer Increases Efficiency of its Library Resources and Offers Greater Access and Utility for Lawyers*.

Following is one way to approach this analysis.

### 1. First calculate expected annual savings:

*Total annual cost for status quo minus total annual cost for digital library*

Factors in determining annual costs can include expenses for print volumes vs. eBooks, as well as costs for space, shipping and subscriptions. Costs can include salaries and wages, materials expenditures and operating expenses. If desired, you can explore lifecycle costs of traditional vs. digital materials,<sup>10</sup> as well as recent expenditure, staffing and related statistics from the Association of Research Libraries (ARL)<sup>11</sup>

### 2. Then calculate percentage savings:

*Expected annual savings divided by total annual cost for status quo*

Your LexisNexis account representative or digital library engineer has tools to assist you in determining ROI.

## SETTING ADOPTION TARGETS

The LexisNexis Digital Library engineers and solutions consultants help customers determine realistic objectives and ways to achieve steady digital library growth. They can access customer data via the OverDrive Marketplace tool to research usage/checkouts and adoption rates for various legal organizations and determine which customers may need extra assistance.

As customers pursue objectives, it's important to strike a balance.

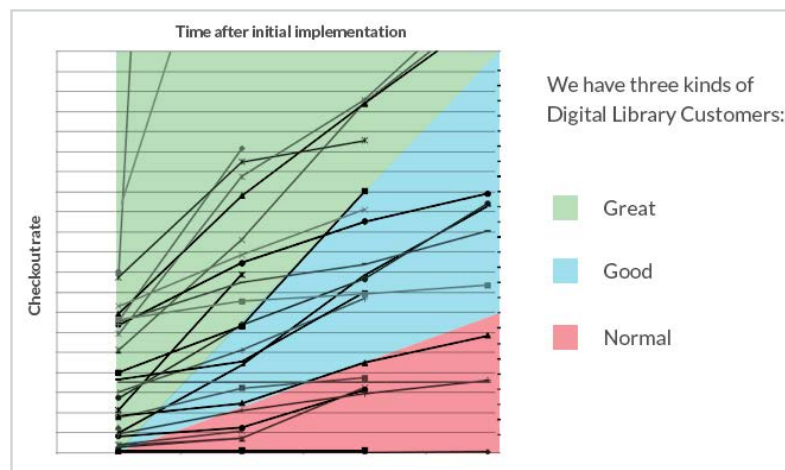
- Set targets, but don't be too specific about how you expect attorneys to use eBooks. Allowing attorneys to guide adoption minimizes resistance and promotes stronger adoption.



- If your initial plan is not generating the desired results, be flexible, gather feedback and explore ways to adjust your approach.

Missing adoption targets can mean missing savings targets, so the LexisNexis Digital Library team proactively helps customers meet their objectives. For organizations seeking to phase out portions of a physical library collection, tracking and improving adoption rates is especially important.

Illustrating one aspect of adoption, the chart below shows rates and patterns of digital library usage. This sampling is a subset of LexisNexis Digital Library customer organizations with varied launch strategies.



Digital library checkout rates are similar initially, but organizations that implement proactive awareness and training programs see increased usage more quickly during the first two years, as represented by the steeper trajectories shown to the left.

#### **BUILDING NEW LEVELS OF SUCCESS**

The LexisNexis Digital Library team also acts on feedback from the LexisNexis Voice of the Customer team. “They (customers) send us questions and comments all the time—sometimes things we hadn’t thought about before,” says Burns. “Then it’s our job to figure out ways to address the matter and keep getting better.”

Customers routinely express their appreciation for this proven onboarding process and the digital library team. One who began onboarding with some initial reservations recently thanked Haux for helping to make a training presentation “a smashing success.”

That success is possible when you take a strategic approach and apply best practices.

## REFERENCES

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- <sup>7</sup> LexisNexis Digital Library is available through a joint initiative by LexisNexis and OverDrive, the digital library solutions provider chosen by 30,000+ libraries, schools and colleges worldwide.
- <sup>8</sup> See change management thinking based on Kurt Lewin’s theory at [http://www.change-management-coach.com/kurt\\_lewin.html](http://www.change-management-coach.com/kurt_lewin.html) and <http://www.change-management-consultant.com/kurt-lewin.html>.
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