

## Communication Strategy

Do the information outputs produced by your library adequately support your library and firm strategy?

To help answer the question posed above, this document collates a list of outputs from multiple firms, allowing you to review the workings of other firm libraries and optionally adopt useful practices not currently followed by your library.

## Categories of Library Communication

### 1. Information resource availability

Communicate the hard copy and electronic information resources available to the firm.

### 2. Information and research requests

Fulfil information requests submitted by members of the firm.

### 3. Training or Professional Development communications

Highlight guidelines and opportunities for professional development.

### 4. News alerts & Curated Newsletters

Push relevant and topical news to interested parties in the firm.

### 5. Usage and research charge reports

Generate and communicate information related to hard copy and electronic resource usage by members of the firm.

### 6. Miscellaneous

Miscellaneous communications related to budgets, contracts and mobile research practices.

## Specific Information Outputs Under Each Category

### 1. Information resource availability

What	Objective	How initiated/requested?	Who responsible?	Frequency	Recipients	How produced/distributed?
OPAC	List hard copy and electronic resources available for use.	Active searching of directory by interested parties.	Technical Services	Ad-hoc	All firm	ILS and Intranet/Portal
Web subscriptions intranet catalog	List of links to available resources on practice group pages, library page, and client pages, etc.	Active searching of directory by interested parties.	Technical Services	Ad-hoc	All firm	ILS and Intranet/Portal
RSS feed	List available hard copy and electronic resources newly added to the collection.	Pushed to intranet/portal	Technical Services	Ad-hoc	All firm	ILS and Intranet/Portal
Pathfinders/Research Guides	Annotated list of "best practices" resources (print and electronic)	Manually emailed to new joiners or interested parties.	Library Directory	Ad-hoc	New starters	Manually produced.
E-routing options	List of electronically routed news. Routed email list resides in Outlook, not in OPAC.	Automatic via Outlook.	Technical Services	Ad-hoc	All firm	Outlook
Mobile App	Lists links and provides individual's login information when working remotely.	Attorney access mobile app on their device.	- Electronic resources librarian - Technical Services	Ad-hoc	All firm	Mobile app (e.g. ResearchHub)
New resource announcement emails	Emails to internal recipients listing new resources.	Generated by library on an as needed basis.	Library Manager	Ad-hoc	All firm	Email

## Specific Information Outputs Under Each Category

### 2. Research requests

What	Objective	How initiated/requested	Who responsible	Frequency	Recipients	How produced/distributed
Research requests	Assist attorneys fulfil matter related research requests.	<ul style="list-style-type: none"> <li>- Email</li> <li>- Phone</li> <li>- Walk In</li> <li>- Request Management Systems (e.g. RefTracker)</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	Ad-hoc	All firm	<ul style="list-style-type: none"> <li>- Email response</li> <li>- Request Management System (e.g. RefTracker)</li> </ul>
Competitive intelligence requests	Assist marketing/business development department in their operational duties.	<ul style="list-style-type: none"> <li>- Email</li> <li>- Phone</li> <li>- Request Management Systems (e.g. RefTracker)</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	Ad-hoc	Marketing Attorneys	<ul style="list-style-type: none"> <li>- Email response</li> <li>- Request Management System (e.g. RefTracker)</li> </ul>
Admin research requests	HR, Finance and Prof Development research requests.	<ul style="list-style-type: none"> <li>- Logged by department – email/phone/etc.</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	Ad-hoc	HR, Finance, PD	Email
Conflicts research request	Support Conflicts department (should this be categorized under “Legal”?).	<ul style="list-style-type: none"> <li>- Request logged by conflicts dept. – email/phone</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	Ad-hoc	Conflicts	Email
Management/executive committee requests	Support firm management with strategic goals related to billing, firm rankings, analysis, etc.	<ul style="list-style-type: none"> <li>- Email</li> <li>- Phone</li> </ul>	<ul style="list-style-type: none"> <li>- Library Manager</li> <li>- Library Director</li> </ul>	Ad-hoc	Firm management Firm executives	Email
Document delivery requests	Assist attorneys and administrative departments in locating specific articles, reports, etc., often using 3 <sup>rd</sup> party vendor	<ul style="list-style-type: none"> <li>- Email</li> <li>- Phone</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	Ad-hoc	All firm	Email
Interlibrary Loan	Fulfil request for print materials not	<ul style="list-style-type: none"> <li>- Email</li> <li>- Phone</li> </ul>	<ul style="list-style-type: none"> <li>- Research Analysts</li> </ul>	Ad-hoc	All firm	Email

	available in firm's collection					
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## Specific Information Outputs Under Each Category

### 3. Training or Professional Development communications

What	Objective	How initiated/requested	Who responsible	Frequency	Recipients	How produced/distributed
Database training requests	Assist attorneys and other firm staff with access to and training on databases.	- Email - Phone	- Library Manager - Library Directory	Ad-hoc	- Attorneys - Legal staff - Admin	Email
General Library trainings	Assist attorneys and other firm staff with introduction to or overview of the Library.	- Email - Phone	- Library Manager - Library Director	Ad-hoc	Attorneys Legal staff Admin	Email
New Lawyer Communication	Provide new starters with initial training information and “getting started” documentation.	Manually from new starter lit	- Library Manager	Ad-hoc	New starters – attorneys	Email
New functionality communication	Provide updates on new library delivered functionality to the firm.	Manually by the library when new functionality calls for it.	- Library Manager	Ad-hoc	All firm	- SharePoint - Intranet - Email

## Specific Information Outputs Under Each Category

### 4. News alerts & Curated Newsletter

What	Objective	How initiated/requested	Who responsible	Frequency	Recipients	How produced/distributed
Client Alerts	Focused news about particular firm clients.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Court Opinions	Relevant updates with latest court opinions.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Practice group newsletters	Content tailored to specific practice groups.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Exchanges		<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Industry alerts	Content focused on specific industry sectors.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> </ul>

		<ul style="list-style-type: none"> <li>- Set up in subscription database</li> </ul>		<ul style="list-style-type: none"> <li>results</li> </ul>		<ul style="list-style-type: none"> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Law firm memos	Firm specific internal memos.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Library subscriptions		<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
News	General news content.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
Regulatory agencies	Updates on regulatory changes.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
SEC alerts	SEC news and alerts.	<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>

Custom topical alerts		<ul style="list-style-type: none"> <li>- Subscriptions to aggregator alerts</li> <li>- Email library with subscription request</li> <li>- Set up in subscription database</li> </ul>	<ul style="list-style-type: none"> <li>- Reference librarians</li> <li>- Electronic Services Librarians</li> <li>- Research Analysts</li> </ul>	<ul style="list-style-type: none"> <li>- Hourly</li> <li>- Daily</li> <li>- Only when results</li> </ul>	All firm	<ul style="list-style-type: none"> <li>- Aggregator tool (e.g. Manzama)</li> <li>- Manually produced by library</li> <li>- Initially setup by Library, but auto sent by database</li> </ul>
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**Action point:** to collate and add curated newsletter examples.



## Specific Information Outputs Under Each Category

### 5. Usage and research charge reports

What	Objective/notes	How initiated/requested	Who responsible	Frequency	Recipients	How produced/distributed
Annual report to Management Committee	Provide a report of hard copy and digital usage - graph usage of digital vs. print.	Internal reporting cycle	Library Director	Annual	Management Committee	Manual collation of data from disparate sources
Hard copy utilization reports	Report on utilization of hard copy information sources.	Internal reporting cycle	Collections/Acquisitions Librarian	- Monthly - Quarterly	- Library Director - CIO	Library Management System
Online research usage reports	Report on usage of premium online databases.	Internal reporting cycle	Electronic Services Librarian Library Director/Manager	- Monthly - Quarterly	- Library Director - CIO	- Manual (using vendor stats) - ERM systems (e.g. ResearchMonitor)
Billing partner charge summaries	Provide regular summaries to partners of charges on their matters.	Library generated	Electronic Services Librarian	Weekly	- Responsible attorney - Partner	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Billing query responses	Efficiently provide backup information related to client billing queries.	- Email - Phone requests (Partners/Attorneys)	Electronic Services Librarian	Ad-hoc	Requestor	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Daily charge summaries	Summary of research charges per individual/department/office/etc.	Library generated	Electronic Services Librarian	Daily	- Library Director - Regional library heads - Individual researchers	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Excluded (out of plan) charge reports	Rolled up or detailed list of excluded charges.	Library generated	Electronic Services Librarian	Weekly	- Library Director - Regional library heads - Individual researchers	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Flat rate vs. actual (in	Client/Matter spend compared to agreed flat rates.	Library generated	Electronic Services	Monthly	- Library Director - Billing Partners	- Manual (Excel data from PI/QV)

support of AFAs)			Librarian			- Analytics System (e.g. SmartRecharge)
Monthly billing summary management reports	Summary of research charges per individual/department/office/ etc.	Library generated	Electronic Services Librarian	Monthly	Library Director	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Non payable charge reports	Rolled up or detailed list of charges for clients that do not pay for research charges.	Library generated	Electronic Services Librarian	Weekly	- Library Director - Regional library heads - Individual researchers	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Recharge reports (for finance)	Reports sent to accounts/finance to support cost recovery/bill-back.	Library generated	Electronic Services Librarian	Monthly	- Library Director - Finance representatives	- Manual (Excel data from PI/QV) - ERM systems (e.g. ResearchMonitor) - Analytics systems (e.g. SmartRecharge)
Research spending threshold exceeded	Regular communications sent to attorneys incurring research charges over a certain threshold (Lexis/Westlaw).	Library generated	Electronic Services Librarian	- Daily - Weekly	- Library Director - Regional library heads - Individual researchers	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)
Reallocation requests for non-chargeable research	Query whether non-chargeable research can be reallocated to chargeable codes.	Library generated	Electronic Services Librarian	Ad-hoc	Individual researchers	- Manual (Excel data from PI/QV) - Analytics System (e.g. SmartRecharge)

## Specific Information Outputs Under Each Category

### 6. Miscellaneous

What	Objective/notes	How initiated/requested	Who responsible	Frequency	Recipients	How produced/distributed
Annual performance report	Report back to management on library’s contribution to the firm – highlight value and business case.	Driven by library.	Library Director	Annually	- CEO - CFO - Executive committee	- Document (word) - PowerPoint
Monthly operations budget reconciliation	Ensure adherence to budget.	Internal reporting cycle	Library Director	Monthly	Accounting	Manual - Excel
Contract renewal savings report	Ensure upper management is aware of any savings achieved.	Library generated	Library Director	Ad-hoc	- CEO - CFO - Executive committee	Manual – Excel/Word
Annual budget submission	Submit budget figures to upper management	Requested by finance/upper management	Library Director	Annually Ad-hoc	CFO ED	Manual
Contractual renewal figures	Communicate major contracts renewal prices to upper management.	- Library generated - Requested by finance/upper management	Library Director	Ad-hoc	CFO	Manual
Mobile research guidelines	List mobile apps, links to the app and instructions on apps use. Communicate mobile research best practices and terms of use.	- Library generated - Mobile research management tool use		Ad-hoc	- Attorney - Mobile researchers	- Email - Mobile research management tool (e.g. ResearchHub)
Embedded librarian communications	Expertise databases, curated newsletters	Library generated	Embedded researchers	Ad-hoc	Attorney	Misc
Special Events, i.e. National Library Week	Notification of special events	Library generated	Library Director	Ad-hoc	All firm	Email
Change in policy/procedure	Notification of change in policy, procedure, access to resources or services (hours,	Library generated	Library Director	Ad-hoc	All firm	Email

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	email address, pricing, etc.)					
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