

Professionals and Web 2.0



- 59% of professionals use Web 2.0 at least once a week.
- 43.7% use it for work purposes.

Introduction

What is Web 2.0?

Web 2.0 refers to a trend in web design and technology that facilitates the publishing and sharing of information among internet users. The term was first used by technology commentator Tim O'Reilly in 2004 to describe a new direction in web use, distinguished by increased interactivity between users.

Web 2.0 encourages the development of a participatory culture, where users contribute content back to the web rather than merely consuming it. Traditionally, websites consisted of static pages for commerce and the one-way delivery of information. Now applications such as blogs and social networks enable users to contribute and share information in ways that did not even exist a few years ago. Web 2.0 sites such as Wikipedia, MySpace and Facebook are now household names, with over half of our surveyed respondents acknowledging the use of these tools in their personal and professional lives.

Web 2.0, professionals and information

Professionals absorb information in many different ways: email, the internet, traditional media and research publications, speaking with colleagues. The relationship between professionals and information has always been influenced by the method of delivery – from books, reports and journals to the internet and online research. The rise of a new set of Web 2.0 tools changes this again – but how? Here are just some of the issues:

- *Do we as professionals trust and rely on blogs, wikis and social networks as we would a professional journal?*
- *Will the rate of professional participation in Web 2.0 match the personal participation rate?*
- *Have the methods we use to assess the accuracy and value of information changed?*
- *Are we gaining value in spending more time using Web 2.0 applications?*
- *Is Web 2.0 changing our workplace practices?*
- *What impact will user-generated content have on professional research?*

These are questions that CCH feels our customers will have to answer over the next few years – so we ask them now. In a survey covering the Asia-Pacific region, over 200 professionals have told us how they use Web 2.0, what they think of it and how it may affect the way they interact with information in the future. We present these results to you in the hope that it may assist you, your organisation and your profession to shape your own response to this new trend in online information.



Graphical representation of the convergence of the professional, information and Web 2.0.

Objectives, methodology, definitions

Objectives

CCH conducted this research to gauge the effects that Web 2.0 and user-generated content are having on the way professionals access, absorb, and disseminate information. The following key questions were identified:

- *How many professionals currently use Web 2.0 tools within their workflows?*
- *How does this compare to recreational usage rates?*
- *For what purpose do professionals use Web 2.0 tools?*
- *What information do professionals expect Web 2.0 sources to provide?*
- *Do professionals trust the information drawn from Web 2.0 sources?*
- *Will professionals place greater trust in these tools and sources 5 years from now?*
- *What impact does corporate policy have on access and use of Web 2.0 tools?*
- *Do professionals believe that access to such tools should be a fact of corporate life?*
- *Should Web 2.0 tools remain free?*
- *Will this change expectations about the pricing of traditional information sources?*

For the purpose of this research, 5 tools were selected as examples of Web 2.0 technology. These were: blogs; wikis; social networks; RSS feeds and readers; and social bookmarking. Some tools have a brand or community associated with them, such as Wikipedia, Facebook and MySpace; others are more generic such as blogging. Respondents were asked for their observations in both the professional and recreational use of a range of Web 2.0 communities.

Methodology

Throughout August and September 2008, 229 professionals within organisations across the Asia-Pacific region responded to our online survey. The majority of respondents (76.9%) classified themselves as professionals across a broad range of industries.

Definition of "frequent": for the purpose of this whitepaper, "frequent" use of a Web 2.0 tool is defined as at least once a week.

Definitions

Blog: short for web-log. An easily updated web page where an individual or a group of people can keep an ongoing journal of news, ideas and opinions.

RSS: acronym for Really Simple Syndication or Rich Site Summary. A group of formats that enables a website to notify users of new or altered content such as a blog post, a news article or a change to a wiki page.

Social network: an application or website that allows people to develop a virtual/online community. Examples are Facebook and LinkedIn.

Social bookmarking: the process of sharing internet "favourites" with other members of a community.

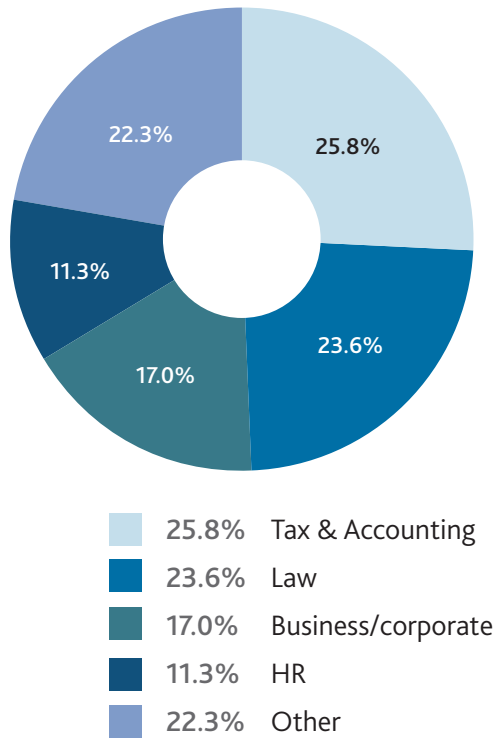
Web 2.0: a trend in web design and technology that facilitates the easy publishing and sharing of information among internet users. Also known as "social media".

Wiki: a collection of pages that can be easily created, edited and re-edited by any member of that wiki's community.

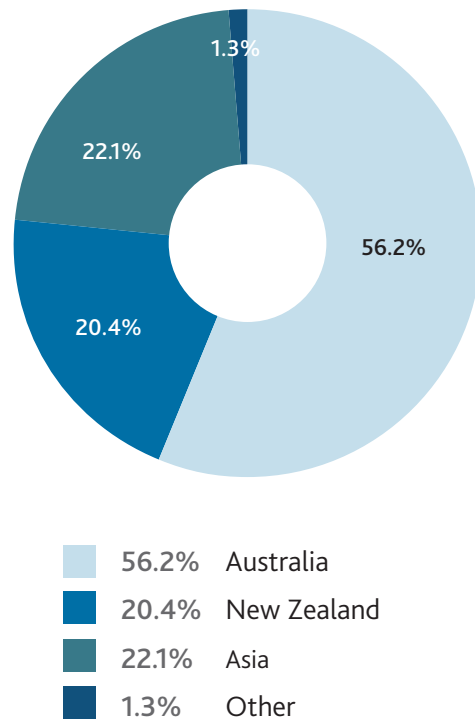
Key statistics

The following graphs represent all survey respondents split according to industry, country, age and corporation size.

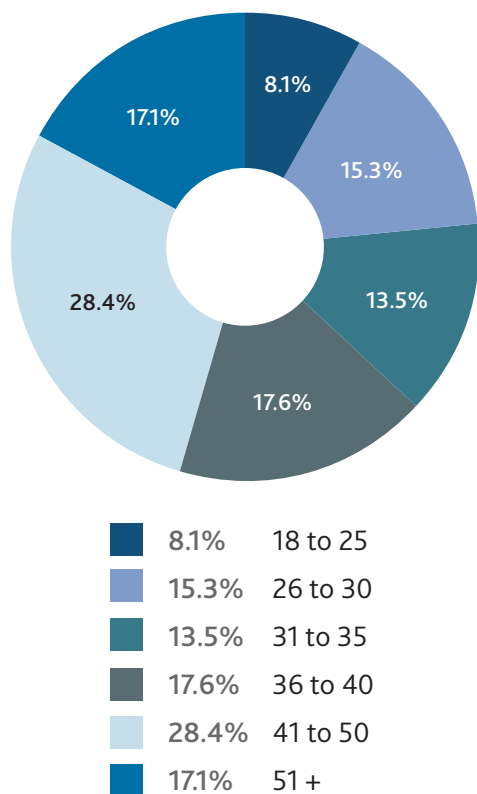
3a. INDUSTRY



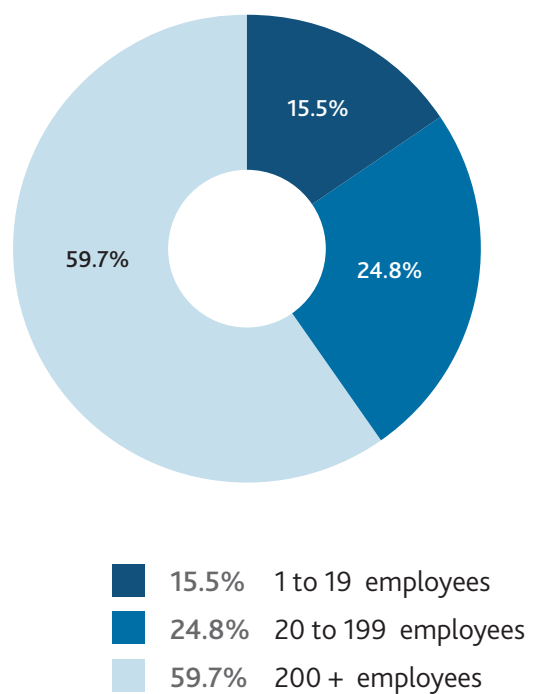
3c. COUNTRY



3b. AGE

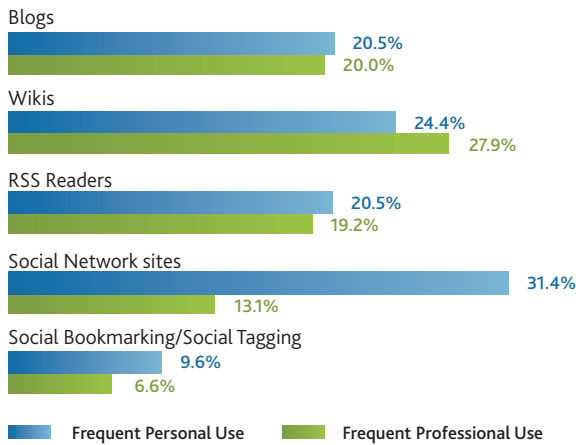


3d. CORPORATION



How professionals use Web 2.0

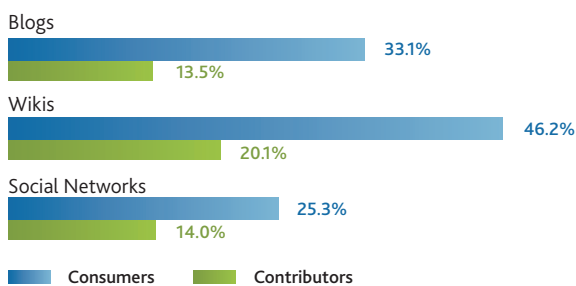
4a. Personal and professional use of Web 2.0 tools



4b. Purposes for using Web 2.0 tools



4c. Consumers vs. contributors



% of respondents who have contributed in a professional context to Web 2.0 tools compared to those who have used Web 2.0 tools.

The ability to quickly and easily share personal news, stories and photos is driving the uptake of Web 2.0, with 48% of respondents already participating in a social network on a monthly basis for recreational purposes.

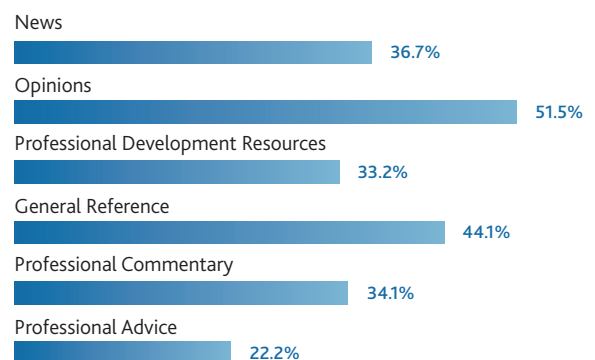
In the professional sphere, Web 2.0 is becoming an extension of existing online research tools, with the majority of respondents using Web 2.0 for research or to keep up with developments in the industry (43.7% and 39.7% respectively).

Professionals generally expect to collect opinions, professional commentary and general reference information from Web 2.0 applications. In addition, Web 2.0 sources offer high levels of relevance and currency and 31.4% of respondents feel that they offer a wider range of views than traditional media.

Web 2.0 places the responsibility on the professional to evaluate the validity of the material. Traditional criteria such as the reputation of the publisher and author cannot always be relied on. However, the participatory culture of Web 2.0 allows for the direct interaction between the author and the reader, creating a new way of evaluating the integrity and value of its content.

Despite Web 2.0's emphasis on participation and content generated by the user community, professionals are currently more inclined to consume rather than contribute.

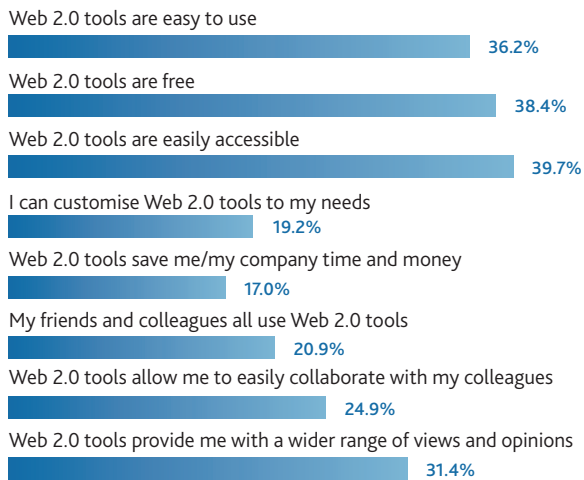
4d. Trust and expectation of blogs and wikis



% of respondents who agreed with the statement "I trust and expect blogs or wikis to provide me with..."

Why professionals use Web 2.0

5a. Reasons to use Web 2.0 tools



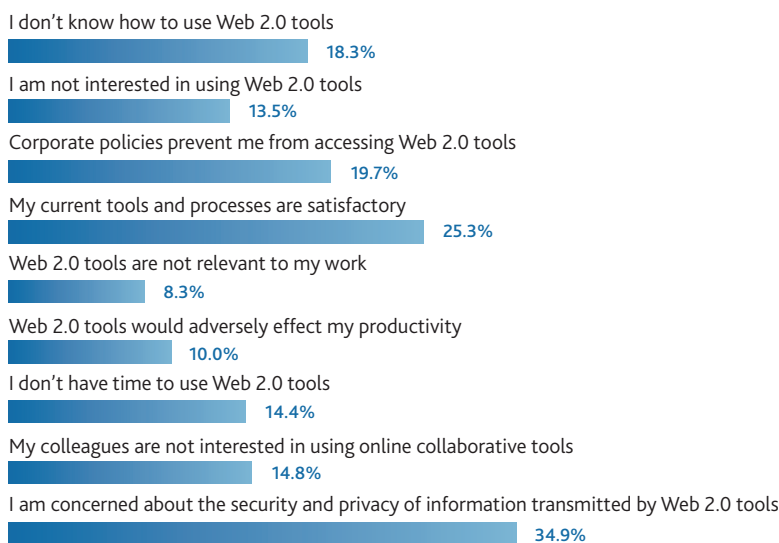
% who agreed with the statements above.

Professionals will continue to expand their use of Web 2.0 as a research tool, considering that 39.7% already find it highly accessible. Nearly as many appreciate the fact that Web 2.0 applications are generally free (38.4%) and easy to use (36.2%).

While 25.3% of professionals may feel that there is no great hurry to change to Web 2.0 tools from their current work processes, only 8.3% feel that Web 2.0 has no relevance whatsoever to their work.

Professionals indicate the greatest concern is with the security and privacy of information transmitted by Web 2.0 tools: 34.9% saw this as a barrier to their use of Web 2.0.

5b. Reasons to avoid using Web 2.0 tools



% who agreed with the statements above.

Organisational responses to Web 2.0

Strategic, organisation-wide response to Web 2.0 is still in the early adoption phase for most industries, with only 20.5% of respondent organisations having planned or implemented a strategy.

Organisations involved in the management and sharing of large quantities of information are more likely to be actively investigating the potential of Web 2.0. The legal profession are the most advanced of industries surveyed with 33.3% having planned or implemented a strategy.

Innovative organisations have identified a variety of internal uses for Web 2.0. These include using wikis for a knowledge base or project planning, replacing all-staff emails with blogging, and enhancing staff directories with social networking features.

If an organisation does not have an articulated strategy, the simplicity and accessibility of Web 2.0 applications may encourage ad-hoc use within sections of an organisation, as was the case for a quarter (25.8%) of respondents. While 7.9% of respondents have actively banned the use of Web 2.0 applications, it appears that most professionals feel this is unnecessary with only 10% feeling it would negatively affect their output.

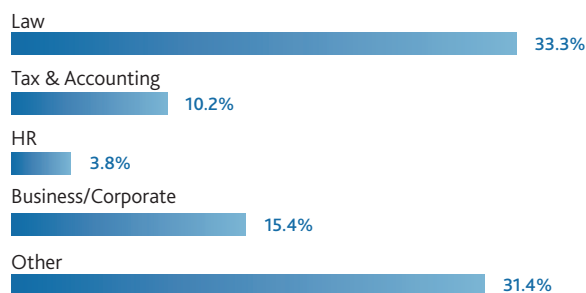
Ultimately, organisations will not expend significant resources on Web 2.0 until there is evidence it will provide a clear competitive advantage.

6a. Organisational attitudes towards Web 2.0 technologies



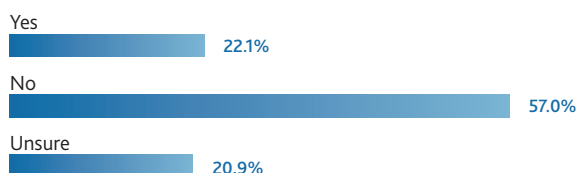
% of respondents who described their organisation's attitude towards Web 2.0 technologies as the above statements.

6b. Planned or active strategy addressing Web 2.0



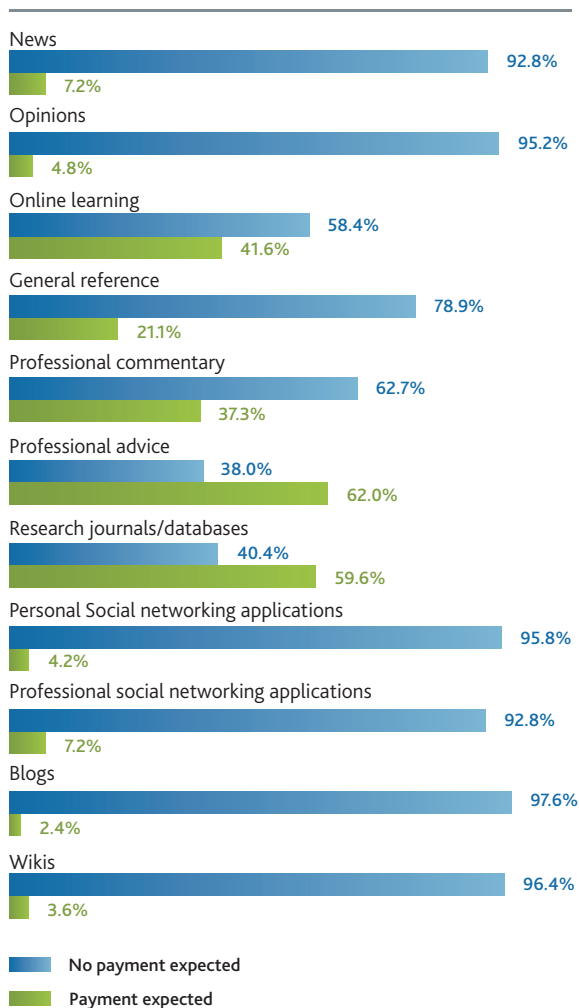
% of respondent organisations from each industry who have a planned or active strategy towards Web 2.0 technology use. Breaks down Fig 6a.

6c. Would a company's attitudes towards Web 2.0 technology influence a professional's choice of employer?



The impact of Web 2.0 on the cost of information

7a. Payment expectations for information



% of respondents who realistically expect the above listed services to be free, compared to those who expect to pay.

The majority of Web 2.0 sites are based on open information that is freely contributed and accessed. 97.6% of professionals believe that blogs should be free, and a similar number believe the same for wikis, social networks and online news sources. Even general reference information is now expected to be a free resource according to 78.9% of respondents.

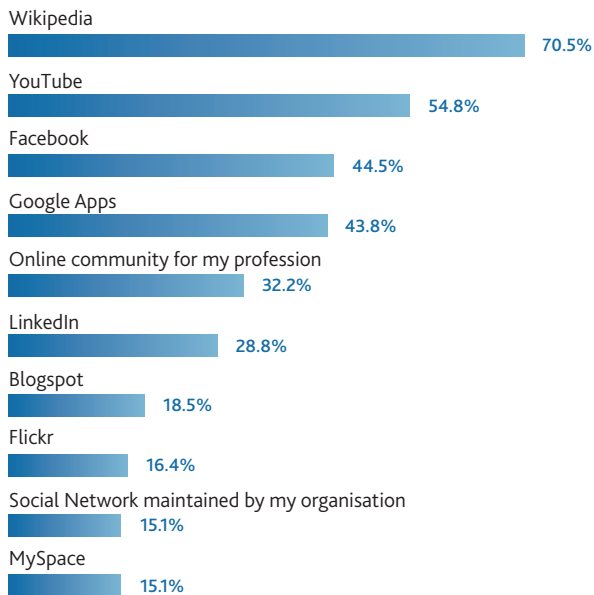
As Web 2.0 and other sources of free information start to compete with paid sources, corporations will have to address how this affects them as a professional service and as a professional consumer. When can freely obtained information be given equal value to purchased information, and when is it inadequate? A well-written article on Wikipedia may be an adequate source of information for an internal business report, but is it something that should be relied on in a court case? Professionals will have to carefully consider the needs and expectations of their clients in making these decisions.

Despite the rise of Web 2.0 and free user-generated information, the majority of professionals believe that some critical information needs can only be met by paid-for premium resources. At present professionals do not trust free Web 2.0 sources to provide commentary, research and advice services (refer fig 4d). 62% expect to pay for professional advice, and 59.6% expect to pay for in-depth research sources such as journals and research databases.

As the credibility of free alternative sources increases, premium services will need to distinguish themselves by offering richer features such as quality search interfaces, rapid updates, notifications and accuracy.

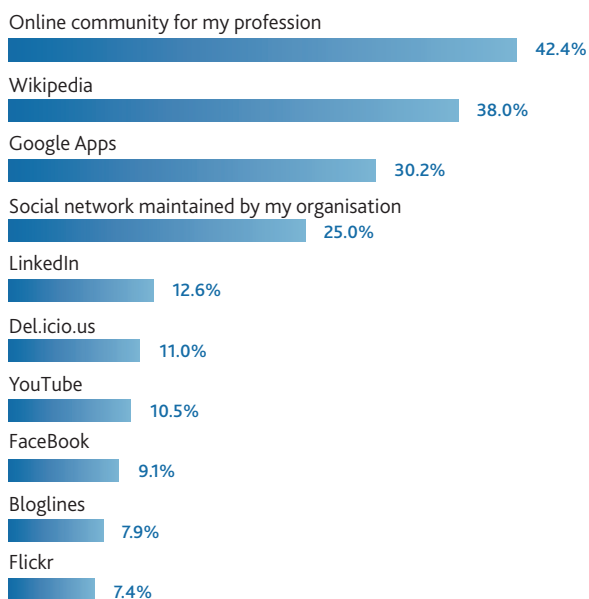
Professionals & selected Web 2.0 communities

8a. Top 10 most popular communities



Respondents selected from a list of 15 communities those in which they communicate. This lists the 10 with the highest % of participating respondents.

8b. Professional value of selected communities



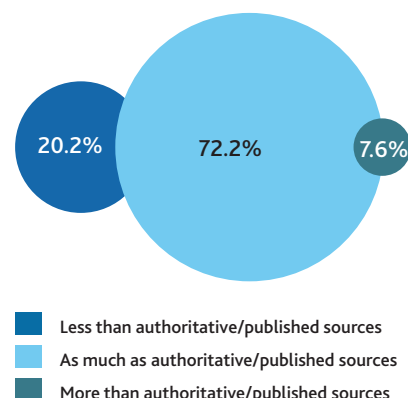
% who feel that the above listed communities have more than moderate value in a professional context.

While certain Web 2.0 communities are popular in a recreational context, they are unlikely to be utilised in the workplace unless they are proven to have professional relevance. 44.5% of respondents stated they participate in the well-known social network Facebook, however only 9.1% see the site as having professional value. In contrast, 42.4 % thought that the same social online community concept in a specific professional context would be of high value.

Results show the primary function of prominent Web 2.0 communities can be one of the factors that influence the perception of a tool's professional value. 54.8% of respondents use YouTube for recreational purposes but only 10.5% said they see it having any value in a professional context. YouTube is still regarded as recreational despite potential uses in learning and development.

In contrast, the popularity of Wikipedia has propelled the concept of the wiki to the forefront of information collaboration and participation. 70.5% of respondents stated they use Wikipedia, with 38% saying they feel it is valuable in a professional context. Wikipedia reflects a trend away from the knowledge of the elite few to the wisdom of the crowds. Currently, 72.2% of our respondents say they value the opinion of their peers in their professional and/or social network as much as authoritative/published sources.

8c. When seeking relevant information for work, professionals value the opinions of peers within professional and/or social networks:

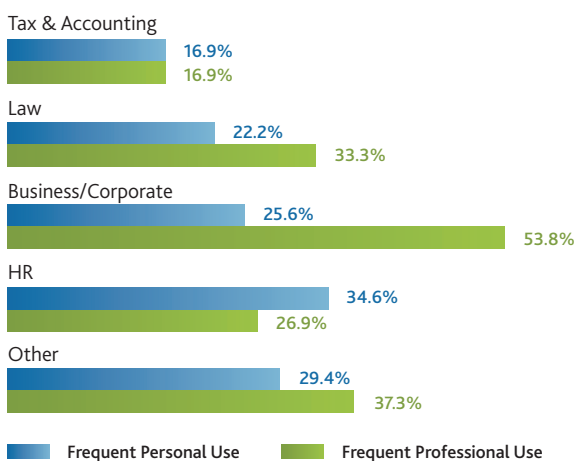


Wikis

A law firm was accustomed to working on joint affidavits with other firms by emailing the document back and forth. But with as many as five other parties working on the same affidavit there were countless versions in people's in-boxes, leading to fears that important details might be missed in the final document. By transferring the documentation to a wiki, the five parties could log on and edit the same document. The changes and their authors were easily tracked, and older versions were accessible at the click of a button. All the parties agreed that the process was much quicker and felt confident that the final document was accurate.

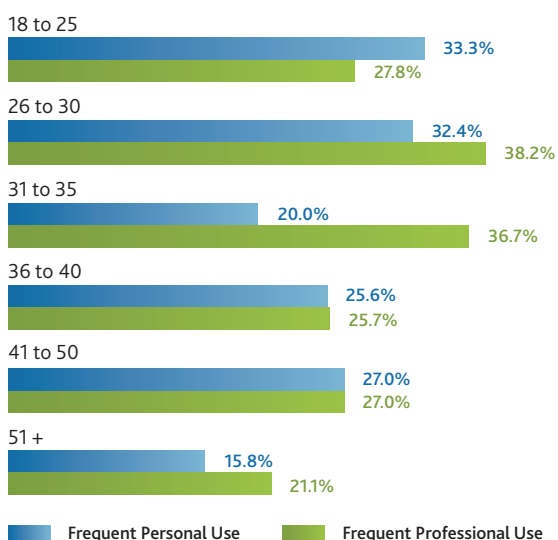
9a. INDUSTRY

Frequent use of wikis – recreational vs professional



9b. AGE

Frequent use of wikis – recreational vs professional



The Tool

In its simplest form, a wiki is a collection of pages that can be easily created, edited and re-edited by any member of that wiki's community. The community may be the employees of a corporation working on a particular project, or it may be the entire online world as is the case with Wikipedia. Unlike intranets and websites, publishing to a wiki is very simple and it allows linking between pages that is difficult in standard office documents, leading many businesses to adopt it as a collaborative tool.

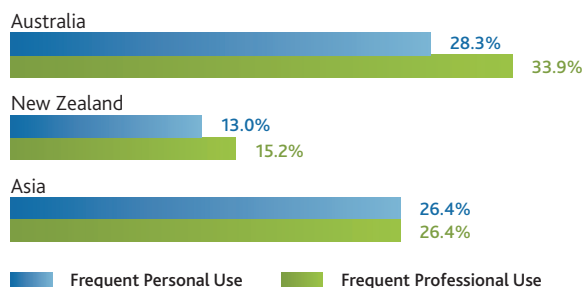
The Information

Debate continues to rage over the accuracy of material to be found on public access wikis such as Wikipedia. The anonymity of authors and the lack of a formal editorial or review process means that it is easy to publish inaccurate information. However, it is just as quick and easy for any reader to correct this information or view older versions. It is not unusual for articles on Wikipedia to be edited and re-edited until a range of contributors are satisfied with the final output – a form of peer-review in itself.

Ultimately, the type and validity of information that appears on a wiki is dependent upon the community that maintains it. One would expect a different quality of material to be published on an organisation's internal wiki than would be found on Wikipedia or a public access legal wiki that is maintained by volunteers.

9c. COUNTRY

Frequent use of wikis – recreational vs professional



27.9% of professionals use wikis at least once a week

The Professional

Of the Web 2.0 tools covered in our study, wikis are the most commonly adopted in a professional context. 27.9% of respondents regularly use wikis for professional purposes. Significantly, 70.5% of professionals use Wikipedia (refer fig 8a) and 38% feel it has high value in a professional context despite the concerns about its accuracy (refer fig 8b).

Professionals are also becoming familiar with wikis as an internal work tool for purposes ranging from project management and team collaboration to providing a platform for dynamic knowledge bases and lightweight content management.

The Future

Almost a third of professionals (30.1%) are already comfortable using wikis, and this is expected to increase. If internal wikis do become a common and effective tool among organisations for managing information, professionals may become less dependent on previous online research sources.

While large-scale public wikis such as Wikipedia continue to flourish, it may be some time before profession-specific wikis gain ground. Many professionals are time-poor and may not feel they have the time to contribute unless some sort of incentive exists.

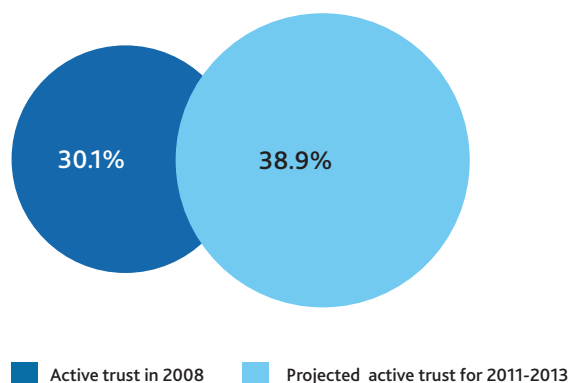
Wikis such as Wikipedia present one final issue for professionals: their very accessibility may encourage clients to believe that adequate professional commentary and advice is available free online. While this could be a threat to professionals, it may relieve the burden of providing basic advice allowing professionals to focus on more complex queries.

10a. Please indicate how often you would use Web 2.0 tools for the following purposes:



Most common uses for Web 2.0 tools as indicated by respondents who frequently use wikis professionally.

10b. Current vs. future trust in wikis



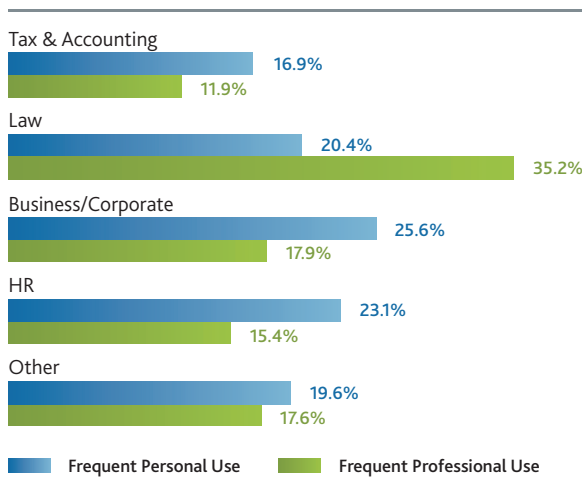
% of respondents who currently place moderate to strong trust in wikis compared to % of respondents who expect to place moderate to strong trust in wikis 3-5 years from now.

Blogs

A Knowledge Manager found it difficult to keep up with developments in her field using traditional methods such as reading books and journals. The available books were hefty reads and often did not apply to her current work situation. She found that many of the most reputed authors and thinkers had online blogs. Not only were they free but the weekly blog posts provided the latest developments and applications of Knowledge Management principles in a format that could easily be read during a coffee break. Soon her professional reading consisted almost entirely of key Knowledge Management blogs.

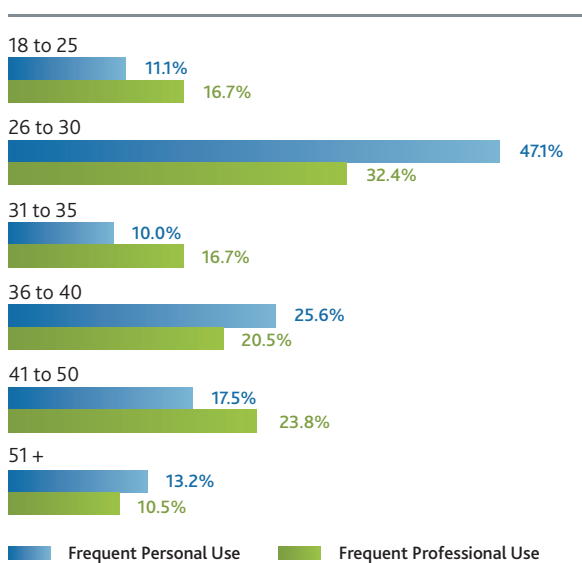
11a. INDUSTRY

Frequent use of blogs – recreational vs professional



11b. AGE

Frequent use of blogs – recreational vs professional



The Tool

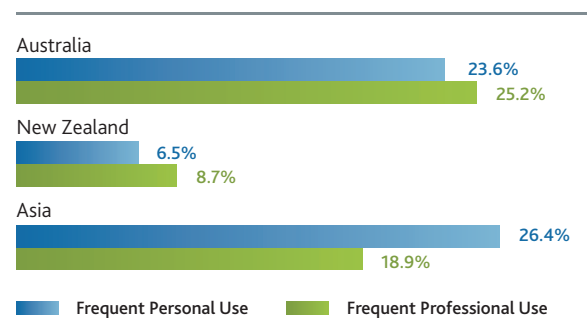
Blogs, short for web-logs, are easily updated web pages where an individual or group of people can keep an ongoing journal of news, ideas and opinions. Readers can add comments to a blog post; bloggers will also often write about each other's posts. In the blogging world (or "blogosphere"), reputation is built by the number of people who read or write about a particular blog.

The Information

Currently blogs are written by authors who have been established as thought-leaders in traditional publishing and media. New bloggers who contribute ideas or information and enter into meaningful dialogue with existing thought-leaders will be recommended on to a greater range of readers. The rapid publishing rate and ability to track comments often leads to a level of dialogue and debate that cannot be matched by the traditional discourse of journals and other publishing.

11c. COUNTRY

Frequent use of blogs – recreational vs professional



20% of professionals use blogs at least once a week

The Professional

Blogs are appealing sources for professionals seeking a regular and quick fix of information that is up to date and relevant to their current situation. 20% of respondents read blogs on a regular basis; the majority of those readers use blogs for professional research and to keep up to date with new developments in the industry. Trust and reputation are critical to the professional reader and can only be developed by peer recommendation or the ongoing provision of reliable information, as one government professional notes:

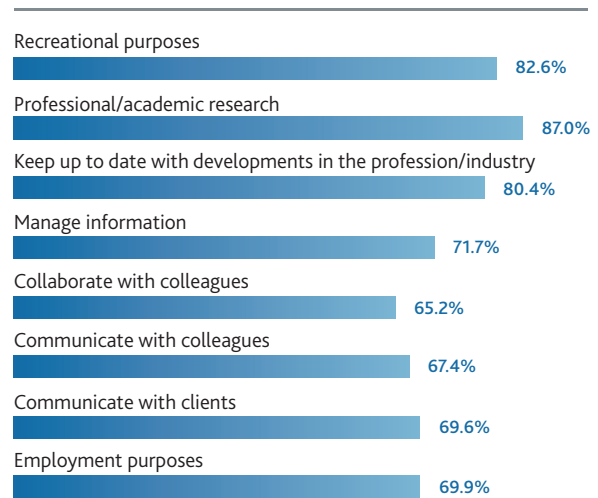
"I strongly trust the Blogs where I know the reputation of the person/company who owns it, or if they are recommended in a Blog of someone I trust. If a Blog is returned in a search I am usually a bit sceptical until I can evaluate the author a bit."

The Future

Blogs are now an established source of information for professionals, and our respondents expect to place greater trust in them in the future. The latest professional developments will be conceived, reported and debated on blogs long before they appear in professional publications. Of course, only the most tried and tested of these developments are likely to reach published journals, and consequently they will remain an authoritative and established source for research.

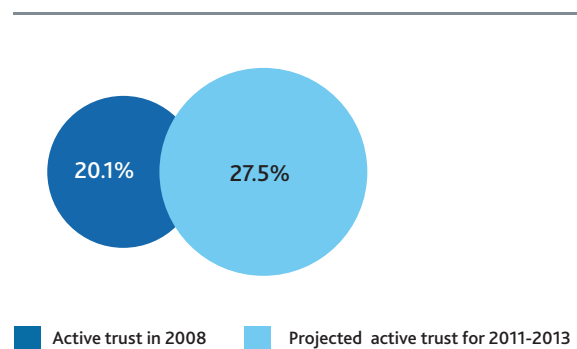
As blogging becomes a more common activity for professionals, we will see some more commercial activity within the blogosphere. Well-known blogs may seek sponsorship to provide ongoing support. Organisations may see value in employing a professional to maintain a blog in order to provide relevant information for clients, drive return traffic to their site and develop their reputation in the process.

12a. Please indicate how often you would use Web 2.0 tools for the following purposes:



Most common uses for Web 2.0 tools as indicated by respondents who frequently use blogs professionally.

12b. Current vs. future trust in blogs



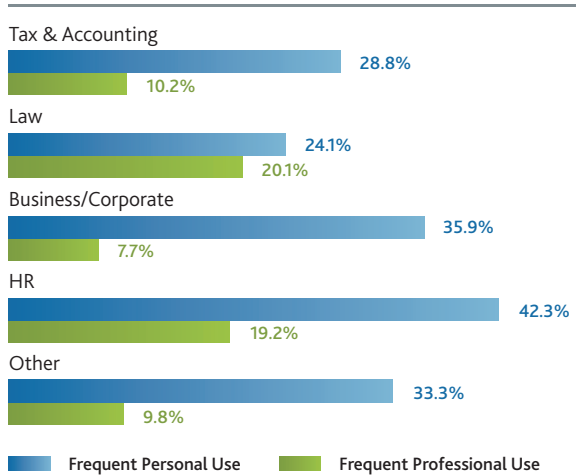
% of respondents who currently place moderate to strong trust in blogs compared to % of respondents who expect to place moderate to strong trust in blogs 3-5 years from now.

Social networks

A recruitment consultant specialised in headhunting professionals for specific roles and projects. By viewing the profiles of prospects on social network sites such as LinkedIn and Facebook, the consultant was able to learn much more about their skills and interests than was usually available in professional directories or corporate web pages. He was also able to identify mutual associates that he could approach for an introduction rather than simply cold-calling prospects.

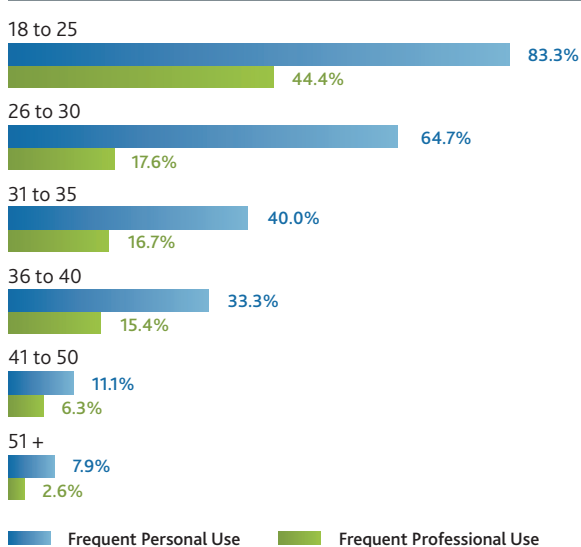
13a. INDUSTRY

Frequent use of social networks – recreational vs professional



13b. AGE

Frequent use of social networks – recreational vs professional



The Tool

A social network consists of software or a website that allows people with common interests to develop a virtual or online community. Essentially it takes the process of networking in a recreational or professional context and translates it to an online environment.

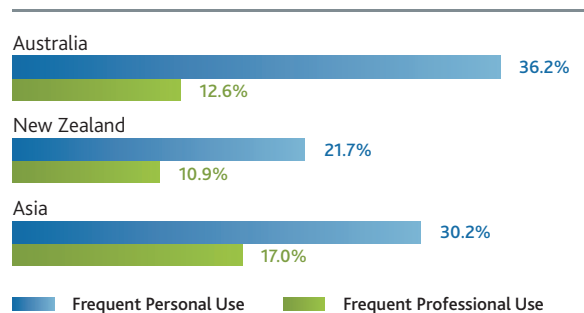
The Information

The primary function of a social network is to provide information about an individual, such as their interests, accomplishments, and activities. This information is primarily provided by the individual and as such will reflect the image they wish to project to the world.

Another level of information is created by the transient communications that social networks facilitate. As one respondent observed, this “provide[s] currency and immediacy in real-life situations, all elements lacking from a text book.” It is easy to send a “private message” or contribute to a forum within the network. This level of centralised functionality has the potential to replace a range of other messaging technologies, particularly email.

13c. COUNTRY

Frequent use of social networks – recreational vs professional



13.1% of professionals use social networks at least once a week

The Professional

Social Networks have the highest contrast between recreational and professional use. Despite having the highest recreational usage rate of any tool at 31.4% (refer fig 4a), only 13.1% use them regularly in a professional context.

It was noted earlier that professionals primarily access Web 2.0 tools to conduct research and track developments in their industry. Social networks are not designed as platforms for this kind of in-depth reference-style information.

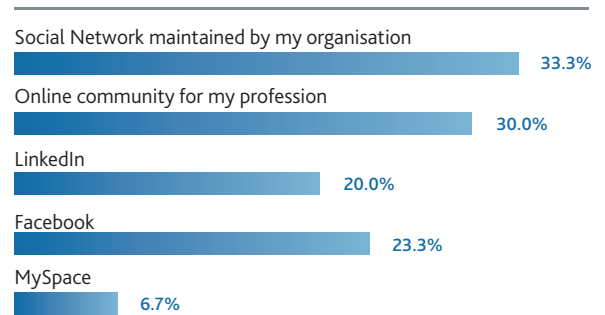
Professionals must also take into account the policies of their organisation before posting any information that could damage its brand or image.

The Future

People tend to take greater care with their professional image, and would put more care into the information they provide to a work-related social network than they would one based around their personal life. Therefore they must perceive some ongoing professional value in order to make this effort.

Currently professionals do not perceive this value, however there is an expectation that as more people participate in a social network the professional value may grow. This is evident in the rise of LinkedIn as the predominant professional network (refer fig 8a).

14a. Relevance of specific social networks to existing professional social network users



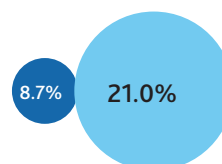
% of frequent professional social network users who feel that the above listed communities have high value in a professional context.

14b. Please indicate how often you would use Web 2.0 tools for the following purposes:



Most common uses for Web 2.0 tools as indicated by respondents who frequently use social networks professionally.

14c. Current vs. future trust in social networks



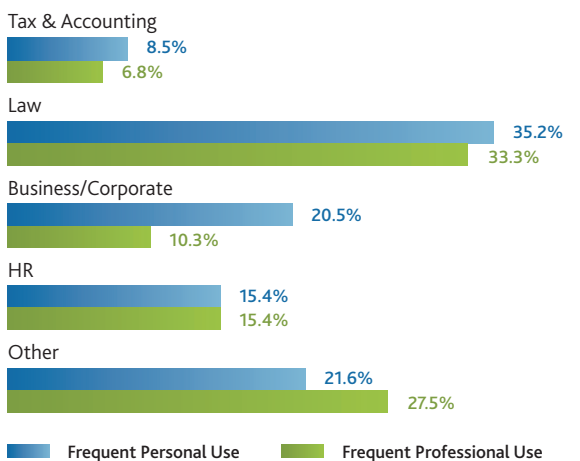
Active trust in 2008 Projected active trust for 2011-2013

% of respondents who currently place moderate to strong trust in social networks compared to % of respondents who expect to place moderate to strong trust in social networks 3-5 years from now.

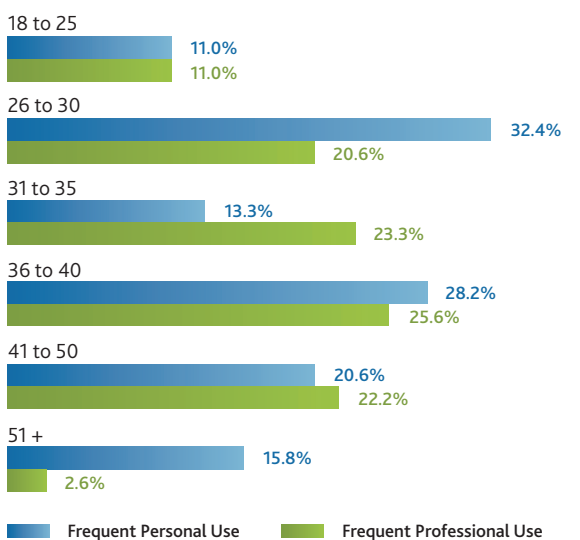
RSS

A corporation commissioned their communications team to start an in-house media monitoring project to assess their image across traditional and new media. The team identified a range of blogs and online professional publications and devised keyword searches to run on news sites such as Google and Yahoo News. Rather than regularly checking the individual sites, the team located the RSS feed for each site or news search and funnelled them into a central RSS reader. This way they were only notified when they received a mention on one of the sites. The team were also able to display the RSS feeds as a scrolling news ticker on the company's intranet.

15a. INDUSTRY Frequent use of RSS – recreational vs professional



15b. AGE Frequent use of RSS – recreational vs professional



The Tool

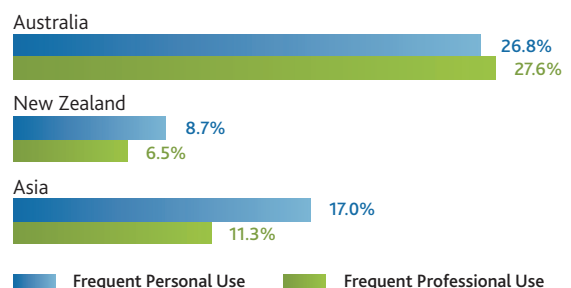
RSS is a group of formats that enables a website to notify users of new or altered content such as a blog post, a news article or a change to a wiki page. Rather than simply appearing on the original website, this content can be pushed out to an individual's RSS Feed Reader (similar to an email inbox) or to a specified location on another website.

RSS differs from the other Web 2.0 tools in this study because it is a tool for delivering content rather than for generating it.

The Information

RSS feeds are available on a range of websites with the most common ones being blogs, traditional media sites, and wikis. Many corporate websites are adopting RSS as a method of providing information and company news to customers without cluttering email inboxes. Readers must choose to subscribe, which means that unlike email inboxes, RSS readers will not receive spam.

15c. COUNTRY Frequent use of RSS – recreational vs professional



19.2% of professionals use RSS at least once a week

The Professional

While many websites now offer content via an RSS feed, professionals are slow to adopt the RSS reading tools that facilitate their use. Only 20.5% of respondents actively use RSS for recreational purposes while 19.2% use it for professional purposes. Those who use it recreationally have clearly also identified its professional value, and primarily use RSS readers to keep up to date with new developments and manage their information flow.

The low adoption rate is most likely due to a lack of understanding about what RSS is and how it functions – some professionals may be reading RSS headlines on their corporate intranet without even realising it.

The Future

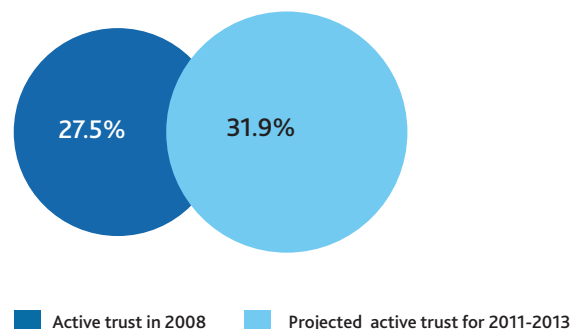
Organisations and individuals will no doubt continue to find new and diverse ways to utilise RSS feeds. Increased individual use of RSS is somewhat dependent on people's willingness to break away from their inbox and access feeds through a reader or browser plug-in. However, it is likely that corporate use of RSS will increase as a method of supplying rapidly updating information on corporate intranets and wikis.

16a. Please indicate how often you would use Web 2.0 tools for the following purposes:



Most common uses for Web 2.0 tools as indicated by respondents who frequently use RSS professionally.

16b. Current vs. future trust in RSS



% of respondents who currently place moderate to strong trust in RSS compared to % of respondents who expect to place moderate to strong trust in RSS 3-5 years from now.

Conclusion

Web 2.0 is rapidly changing the landscape of professional information, with 43.7% of professionals using Web 2.0 tools at least once a week. While results show there is some reluctance for many organisations to adopt Web 2.0 before value can be established, a high percentage of ad-hoc use (at least 25.8%) is occurring due to the accessibility and functionality of the tools. This suggests Web 2.0 applications have gained a significant share of time spent online. We are increasingly using these tools to search, communicate and contribute to the web in both a personal and professional context.

Traditional publishers and providers of content ranging from news to professional research are reacting in different ways to this trend. Many are taking a “wait and see” approach to how their customers may access content in the future. Some see Web 2.0 purely as a communications channel with blogs, wikis and social networks offering a new way of connecting with customers. Other publishers, in particular newspaper sites, are enhancing content with blog-style commenting options, encouraging the convergence between traditional and social media.

Overall the research has indicated that whilst Web 2.0 may be revolutionising the web with user-based content, professionals are careful in their use of these types of tools for professional research. This is largely driven by a lack of trust in the accuracy of services that may not have the backing of a trusted brand or a rigorous editorial process. There are also concerns about user privacy, data security and identity fraud. A significant proportion of professionals expect Web 2.0 sources to offer relevant opinions (51.5%) and general reference (44.1%), however approximately 60% believe that their in-depth research and professional advice needs are better met by premium-based research sources.



About us

A close-up photograph of green fern leaves, likely a fiddlehead, covered in numerous small, clear water droplets. The leaves are vibrant green and have a serrated, feathery texture. The background is dark, making the green leaves and white droplets stand out prominently.

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