WESTLAW

# Guide to Choosing the Best Legal Research Software Solution for Your Firm

GUIDE TO CHOOSING THE BEST LEGAL RESEARCH SOLUTION FOR YOUR FIRM

There is no margin for error when it comes to researching matters such as case law and precedents. Whether you are a practitioner managing a client's legal affairs autonomously, overseeing a junior lawyer or you are gathering legal data for a partner, your case law research should be the trusted source of truth.

As a legal practitioner, there are crucial moments where access to accurate and thorough research is key to delivering successful client outcomes. No matter the area of the law you specialise in, without a suitable platform or provider to keep abreast of precedents and court rulings, you may go excessively overtime - billable or not - on legal research admin.

Legal research software is here to help with the increasing demands placed on legal practitioners, offering a range of legal research tools and software to consider. For those in the market for legal research technology, this step by step guide will help to narrow down your options.
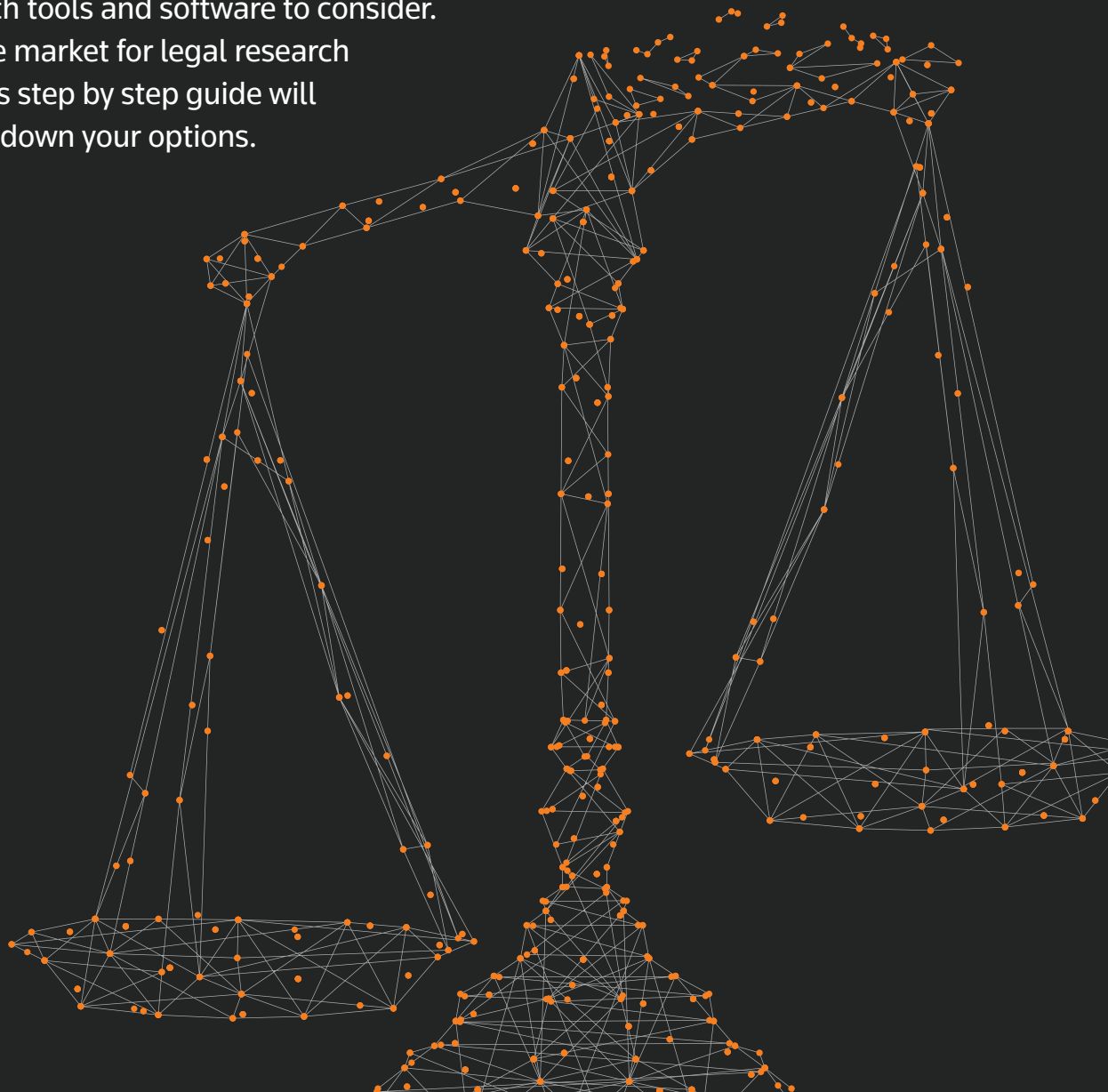
Background on legal research and modern software solutions

Practicing as a lawyer was different before cloud computing. Firms had servers set up – often in multiple places – to store their data, just like their legal software came in hardware form (user manual included). As the profession has grown and developed, so too have legal technology offerings in the market. Stakeholders have growing trust in the ability for legal technology to provide safe and secure options. For example, in KPMG's 2019 Global CEO Outlook survey, 68% of Australian CEOs agreed they are more confident about increasing the use of cloud technologies in their organisation, compared to the year prior.

Today, most cloud based legal research software do not require extensive training and law graduates entering the workforce primed to use them. Enhanced legal research capabilities have become highly integrated into the lawyer's daily workflow like a pen to the hand. Legal departments and law firms are opting to use legal solutions which reflect the expectations of high performance they place on their lawyers. Whether you are looking to retire an inefficient legal research tool or simply need a new case law software solution, weighing up the true benefits of investing in a solution to secure buy-in from your stakeholders is the first step.

BUILDING A BUSINESS CASE FOR LEGAL RESEARCH SOFTWARE

Are there gaps in your firm or department that could be resolved with greater access to premium case law insights? Perhaps your client list has plateaued and one of your business objectives is to increase clientele by a certain per cent this quarter. To build a business case for investing in a legal research solution, the groundwork will be in how you pitch the proposal to your Knowledge Manager or decision-maker in your firm. Or, if you have the purchasing power, you are responsible for proving the investment worthwhile.

This is why you'll need to weigh the cost involved against the benefits the technology will provide to your workplace when considering the proposal or pitching to the business. For example, one benefit may be enhancing your practitioners' ability to meet client demands more efficiently and thus take on more business. Another upside to include in your proposal may be that practitioners in your firm or department will gain a certain number of hours per week due to increased efficiencies a legal research solution will bring. To help ascertain the benefits, below are a number of features to consider in your search for the best solution.

the answer company™
THOMSON REUTERS®

Last year, Acritas forecasted that Australian legal departments would **REDUCE THEIR LEGAL SPEND BY 45%**

- State of Australian Corporate Law Departments 2019 by Acritas

TOP FEATURES TO LOOK FOR IN A LEGAL RESEARCH SOLUTION

In a report released by Thomson Reuters Legal and legal research body Acritas in 2019, it was revealed that legal departments were projected to reduce their legal spend by 45%. This was the most severe budget cut estimation in comparison to the global average, which at the time was only sitting at 24%.

In an Australian market, where does this leave General Counsel or law firm Knowledge Managers when aiming to secure budget for legal research expenditure? The answer lies in building a business case for stakeholders based on the cost-cutting benefits to be gained from purchasing a legal research solution, which cannot be done without comparing key features offered by legal research solution providers, including...

Speed to reach the legal answer

In a recent survey conducted by Thomson Reuters Legal, over 75% of its legal practitioner respondents said that "speed to answer" is "important", "extremely important" or "very important" to them. So, how well does your legal research platform perform when practitioners in your firm use it day-to-day? In Australia and New Zealand, we know that there are free, online legal research solutions which cater to firms that have not yet invested in legal research software. If your firm sits in this camp, why not conduct an audit of how much time your practitioners spend browsing these free databases? This will enable you to work out whether switching over to a software that delivers faster case law interpretation would be money well spent.

Pricing models for legal software that fit your business preferences

In recent years, client demands have led to the emergence of alternative billing models in law firms. The same can be said when it comes to legal technology providers, some of which can adjust the way they charge their customers for services. This could mean signing a monthly payment plan contract, where you have the ability to opt out of the product past a certain time period due to change of mind.

Another form of flexible pricing in a legal research solution can include growing with you as your research needs increase. For example, maybe your firm specialises in one area of the law but you manage a client with legal counsel needs that overlap into another. Aim for a legal research solution with a feature that enables you to purchase cases on a once-off basis. Should business ramp up with that particular client, or your firm simply expands its legal practice areas, you may opt to extend your legal research solution subscription accordingly.

Premium legal content written by real lawyers

The legal solution that you or your legal department settle on must be the go-to place to find cases and precedents. You'll need to be 100% confident in the content your software solution is retrieving for you in the search results, so you can communicate your findings to stakeholders or clients with the conviction that you have done your due diligence. Be wary of providers that do not disclose the credentials of legal writers and editors behind their platforms, as some may operate in different jurisdictions and will not have the local knowledge that comes with having practiced law or graduated from a local university.

With court rulings being served regularly, it's also a good idea to know how frequently the legal solution updates its databases and ensures content such as precedents are time-stamped and referenced with adequate detail. Most solutions will have their own quality assurance policies, which is a great way to further establish whether your shortlisted product should make the cut. Remember, while free legal research facilities online can be convenient, they usually do not come with the promise of providing every piece of backdated legislation while integrating with the latest search feature capabilities. If you are a lawyer or paralegal in a firm, this is a deal-breaker, meaning you'll need to ensure the legal research solution your firm or practice invests in covers all legislation.

You need to be **100% CONFIDENT** in the content your software solution is retrieving for you in the search results

the answer company™
THOMSON REUTERS®

Artificial intelligence and machine learning for a seamless legal research experience

With robust legal databases growing by the day, technology has been able to grow alongside it, offering lawyers smart and time-saving user experiences. If your legal research solution does not take advantage of AI and machine learning, your firm or legal department will miss out on the clear benefits. For instance, AI feeds on user behaviour data, so the more you conduct your legal research, the faster it can learn to know your research needs and thus serve you more optimal search results.

Legal practitioners should not have to moderate their research style to fit the machine - the machine ought to adapt with them. Artificial intelligence ensures that a legal solution will continuously adjust to the patterns of its user. This can be shown in examples such as search suggestions cropping up in the legal research interface which prompt you to choose a term that other lawyers have similarly been searching. Remember, the quality of AI and machine learning capabilities can vary greatly, so do your background research and make the presence of AI a non-negotiable.

Flexible legal research experience

Your legal research solution should lean more on the side of flexible, rather than be so counter-intuitive that it dictates how you approach your legal research tasks. Look for features which enhance your experience, such as a simple, yet effective user interface, the option to browse at your leisure and the ability to find an almost immediate answer when you need it. Providers may offer features you haven't even given a thought to, whether it is detailed litigation history in a string of cases or the ability to customise your search style and save it in your settings.

As a legal practitioner, an enhanced user experience is going to make all the difference, so be sure to see which features go above and beyond what you imagine the ideal legal research solution to be. Every minute you spend reading up on legal cases should be worth your personal or billable time.

Narrowing the list down to one legal research solution

There are plenty of factors that go into arriving at a decision to purchase a legal research solution, especially when your whole firm or department is going to be using the software, day in and day out. That's why we are concluding this guide with testimonials from our Westlaw customers, who have plenty to say about what they like best about the solution.

The new Westlaw compliments the way lawyers think about and conduct legal research. At times it has provided me with concise answers, in seconds. For example, I was recently faced with a situation where I wasn't exactly sure how to begin my search, so I began by just typing a question. Within seconds the new Westlaw gave me not only the relevant section of the applicable act, but some very useful case law.

Since my firm has begun using the new Westlaw for all their legal research and knowledge work, it's noticeable how simply they can find what they need, when they need it. There is a lot of smart technology incorporated into the new Westlaw searches. Even if searches are simple, the system displays useful sources related to what they have searched for - even questions.

We actually had a matter recently involving insolvency proceedings. Those matters by their nature are urgent as you need to present in court with a range of evidence. We were instructed a week before the hearing, so we relied on the new Westlaw for our searches, and were delighted with the result in court. We produced 600 pages of evidence which we filed in the Federal Court on the day we undertook the searches, and on the hearing day we obtained a judgment in 45 minutes.

David Kim
Barrister
Owen Dixon Chambers

Danny King
Owner and Director
Danny King Legal

Mark Wilson
Partner and Co-Founder
W Advisers

the answer company™
THOMSON REUTERS®

LEARN MORE

For more information about Westlaw, visit
thomsonreuters.co.nz/westlaw