Selecting Practical Law Connect for an Efficient Task-Based Solution for In-House Counsel

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What You Need To Know

Legal departments have found themselves under increasing pressure to be more efficient and reduce their overall legal spend. In response, legal departments have looked to adopt solutions that have allowed them to integrate previously disparate tasks, reducing the amount of time required to complete specific tasks and number of overall solutions that organizations have had to adopt. Reflecting this trend, Thomson Reuters introduced Practical Law Connect, which integrates Practical Law and its focus on providing legal practitioners with legal know-how with Thomson Reuters Westlaw and its access to primary and secondary sources and forms. Per Thomson Reuters, Practical Law Connect was developed with the particular goal of providing transactional attorneys and in-house attorneys with a single resource to the legal materials that would be most important for their practices. For many in-house counsel, the research tools available may not provide sufficient functionality or hamper the ability of legal teams to conduct and complete their daily legal tasks.

Overall, the organizations interviewed found that the task-based organization of the solution allowed them to quickly identify the different aspects of the legal matter they faced, and which ones were the most relevant, by drilling down into sub-topics necessary to respond efficiently to the matter. Additionally, interview subjects reported the use of Practical Law Connect provided them with the ability to conduct large research projects – such as the development of company policies – more effectively, allowing them to provide additional overall value to the organization.

About the Participants

Blue Hill Research conducted interviews with five organizations who were early adopters of Practical Law Connect. The organizations

AT A GLANCE

Research Participants

Five organizations with revenues ranging from less than $10 million to more than $100 million

Solution Sought

Legal workflow solution with a focus on in-house legal counsel

Vendors Considered

LexisNexis Advance, Thomson Reuters Practical Law, Thomson Reuters Practical Law Connect, Thomson Reuters Westlaw

Solution Selected

Thomson Reuters Practical Law Connect

Impact of Solution

• Increased efficiency for legal research
• Reduction of legal research spend.

Investment Drivers

• Pressures to reduce overall legal research spend
• Pressures to become a more efficient business unit

Reasons for Selection

• Access to Practical Law and Westlaw legal resources
• Task-based organization
Anatomy of a Decision

Profiled in this report include a chemical manufacturer, an insurance provider, a consulting firm, a staffing firm, and a health care company. All of the organizations operate across multiple states and face multiple jurisdictional and regulatory environments. However, all five organizations have different regulatory requirements and place different constraints on their in-house legal departments. Further, each of the in-house legal departments had different levels of experience, and ranged in size from one attorney on staff to multiple attorneys where different attorneys were given specific job functions.

Blue Hill Research conducted these interviews to determine why these early adopters chose to invest in Practical Law Connect, including what issues drove them to make the investment, the value provided to date, and any next steps these organizations plan on taking, whether contemplating the expansion of the use of the solution or a contraction.

Core Investment Drivers

Blue Hill Research has conducted a number of studies on the benefits of solution integration in the legal world, which has become particularly important as organizations across the legal environment from law firms to corporate in-house legal departments look to respond to increasing pressure to become more efficient. For example, Blue Hill Research recently analyzed survey data and conducted interviews with management of small law firms in three key areas—litigation firms, business law firms, and general practice firms.

Across these legal practices, management was looking to identify and utilize solution integration to improve the overall efficiency of their legal practices, allowing attorneys to complete more legal tasks with fewer resources.

Not surprisingly, legal departments report facing similar, if not greater, pressures originating from the C-suite to conduct more tasks while utilizing fewer resources. With this increasing pressure to become more task-efficient, there is an accompanying drive to provide heightened value to the organization. In response, in-house legal departments have begun to look to solutions that will allow them to become more efficient on a daily basis, offer more strategic, value-added counsel to issues facing the company, and provide better value for the price. Blue Hill Research has identified two key areas where legal departments have recognized opportunities to improve the overall department efficiency: (1) adopting solutions that integrate aspects of legal research to create a more efficient process; and (2) adopting solutions that allow legal departments to actively manage project workflows.

Blue Hill Research interviewed five organizations about their adoption of Practical Law Connect, and all five stated that their decision to invest in Practical Law Connect was driven by the need to develop a more efficient research practice. All faced similar challenges as in-house counsel, as they looked for solutions with the capability

About the Solution

Practical Law Connect is a legal task-based solution offered by Thomson Reuters.

Core Functionality

- Task-based menus to provide practitioners with easy access to checklists, forms, and templates.
- Integration of Practical Law and Westlaw resources for comprehensive legal guidance.
- Editorially-selected resources by task, saving corporate counsel valuable time.
- Natural-language search functionality.

Deployment Model

Web-based.

Pricing Model

Subscription-based with the option to add additional tools and content (e.g. Drafting Assistant Essentials, Company Search, West LegalEdcenter etc.) as needed.
to address a wide variety of matters – for generalists and specialists alike. One in-house counsel likened the experience to a new problem every day and never the opportunity to develop substantive expertise in any area.

Blue Hill Research observed three key motivating factors that drove investment:

1) Become a more efficient business unit;

2) Find tools that reflect the day-to-day research needs of in-house counsel; and

3) Find a tool that assists the legal department with locating relevant checklists, forms and templates to improve the transactional practice of the legal department.

As a group, these factors contributed to significant obstacles the participants were having as they sought to develop a more efficient, cost-effective legal department. For many of the participants, previously available research tools did not provide access to the breadth of information necessary, requiring practitioners to engage with multiple tools, verify information through general, broad-based internet searches, or contact outside counsel early in the process for general research knowledge. Working within these limitations, the participants lacked effective control over legal spend, and faced significant roadblocks when attempting to conduct legal research that crossed from traditional case-based research to incorporating practical legal tips.

**Solution Evaluation and Selection**

Driven by challenges to become more efficient business units and to reduce the overall cost of legal research spend, the profiled organizations sought a research tool that centralized all of their legal research needs, including access to databases of primary and secondary sources, practical legal guidance, template forms, and checklists. The companies reviewed a variety of legal research tools in pursuit of this need, including solutions provided by Thomson Reuters Practical Law Connect, LexisNexis Advance, Thomson Reuters Practical Law, and Thomson Reuters Westlaw, and supplementing these tools with general internet searches.

Blue Hill Research identified two factors used in the evaluation of these solutions, as reported by the participants:

1) Task-based organization, providing users with the ability to quickly identify relevant research topics, learn the broad basics of the topic, and determine specific areas of focus relevant to the matter at hand.

2) Integration of Practical Law with Westlaw resources to improve the efficiency of the legal department and to reduce legal research costs.

“I was switching from a litigation role to a general counsel role, which can be a big switch. I wanted something that would help with that transition. I wanted another layer to ensure that I’m getting everything done that the company needs me to get done. Practical Law Connect has great checklists and broad overviews of different areas of law. I still have to go to outside counsel for certain things, but Practical Law Connect is a great preparation tool to make sure we’re all on the same page at the beginning.”

*General Counsel*  
*Chemical Manufacturer*
Task-Based Organization

In 60 percent of the organizations interviewed by Blue Hill Research, the task-based organization was an important factor in both choosing to make the decision to invest in Practical Law Connect as a legal research tool and utilizing the solution to improve the legal department’s overall efficiencies. Practical Law Connect provides users with a number of entry points through which they can begin their legal research tasks. As observed by Blue Hill Research, the two most commonly used methods of conducting legal research were through using a natural-language search and using the task-based menus.

The search function that is likely the most familiar to most practitioners is the natural-language search function, which is similar to the search capabilities offered by Westlaw. Using the natural-language search function, a user can search all available databases through Practical Law Connect and receive relevant responses, including forms, checklists, and primary and secondary resources. Additionally, the user can narrow the focus of the search using specific filters to reduce the number of responses and find relevant forms that match the requirements of the organization. To conduct a truly responsive natural-language search, however, requires the practitioner to have prior knowledge of the topic area, which can limit the efficacy of that option.

Additionally, Thomson Reuters developed the use of task-based menus to provide users with an alternate entry point when conducting legal research, understanding that in-house counsel frequently address issues in a wide array of subject areas preventing them from becoming a subject-matter expert in any one area. The menus allow counsel to begin their search either through an “In-House Counsel Projects” menu or by searching a menu dedicated to “Practice Areas.”

Table 1: Practical Law Connect Task-Based Menu Offerings

<table>
<thead>
<tr>
<th>In-House Counsel Projects</th>
<th>Sample Practice Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Acquiring, Setting Up, or Disposing of a Business</td>
<td>• Antitrust</td>
</tr>
<tr>
<td>• Financing a Business</td>
<td>• Arbitration</td>
</tr>
<tr>
<td>• Company Business Operations</td>
<td>• Capital Markets &amp; Corporate Governance</td>
</tr>
<tr>
<td>• Legal &amp; Regulatory Compliance</td>
<td>• Commercial Transactions</td>
</tr>
<tr>
<td>• Managing Risk, Claims, &amp; Litigation</td>
<td>• Corporate M&amp;A</td>
</tr>
<tr>
<td></td>
<td>• Employee Benefits &amp; Executive Compensation</td>
</tr>
<tr>
<td></td>
<td>• Intellectual Property &amp; Technology</td>
</tr>
<tr>
<td></td>
<td>• Labor &amp; Employment</td>
</tr>
<tr>
<td></td>
<td>• Real Estate</td>
</tr>
<tr>
<td></td>
<td>• Others</td>
</tr>
</tbody>
</table>

Source: Blue Hill Research, June 2016

Additionally, users have the opportunity to license additional content that focuses more specifically on their particular practice area, including such features as Company Search, Drafting Assistant, and West LegalEdcenter.
Figure 1: Task-Based Organization

Source: Thomson Reuters, June 2016
The participants who relied upon the task-based menus found the flexibility provided by the different search options allowed them to more efficiently identify and address the particular legal matter at hand and obtain a better understanding of how to address the particular issue. The participants cited the ability to obtain a broad, general overview of the subject area and then narrow the focus of the search through subtopic links to access relevant primary and secondary sources, forms, and checklists as particularly important in enhancing the efficiency of their legal research tasks. Additionally, participants stated that the state-by-state comparison tool allowed them to more efficiently expand the scope of their research and to structure organizational policies that reflected differences among state laws or create a comprehensive set of policies to conform to the different jurisdictional requirements an organization with a multi-state presence is going to experience.

The participants reported that the flexibility offered by task-based menus provided them with the ability to delve into areas where they had little expertise and to quickly identify changes to the legal or regulatory environment that was important to their particular organization and properly provide guidance to their organizations.

Integration of Practical Law and Westlaw

Participants identified having a legal research tool dedicated to transactional tasks that also allowed for easy access to both the Practical Law and Westlaw content as being a driving factor into the decision to invest in Practical Law Connect. Participants responded that the integration of Practical Law and Westlaw provided them with access to practical guidance offered by Practical Law and primary and secondary sources offered by Westlaw. For the participants, the efficiencies gained by having a starting point dedicated to their transactional tasks provided them with the opportunity to conduct additional value-adding tasks and to become a more cost-effective legal department.

For all the organizations, there was a desire to both save time and reduce the overall costs associated with the legal department; as such, most acknowledged streamlining and managing costs as a primary driver behind the decision to invest. These organizations also acknowledged that reducing the time to complete a given task allowed the legal department to either reduce the amount of legal spend on outside counsel or freed up time within the department to engage in additional tasks. Time-saving is closely associated with cost-saving, especially within the corporate legal department. Eighty percent observed a noticeable improvement in the overall efficiency with which in-house lawyers are able to find the legal resources they need.

"In 2014, it took me four months to put together our organization’s social media policy, cobbling it together from other research tools. Going into Practical Law Connect, I can identify the task I am working on and it is right there. I can compare our current policies against the templates and easily make any changes we need to make. Instead of using a variety of resources, it’s all right there. It saves me a lot of time and effort."

Compliance Officer
Insurance Provider
Key Observations and Takeaways

Per interviews conducted by Blue Hill Research, the majority of participants found Practical Law Connect provided the legal departments with a number of benefits—particularly allowing them to consolidate their research efforts and more efficiently locate information directly related to their needs. The participants noted that the benefits provided by Practical Law Connect provided the legal department with the opportunity to expand their role within the organization and conduct additional value-adding tasks. Four out of the five organizations interviewed for this report found themselves using Practical Law Connect more frequently than they had initially expected with multiple organizations noting that it had become their primary research tool. While the legal teams can access Practical Law or Westlaw directly, they report beginning their initial investigation through Practical Law Connect. Participants noted that with Practical Law Connect, they are able to efficiently identify research topics and areas pertinent to a particular matter. For these organizations, Practical Law Connect had become a valuable tool because of its ability to quickly narrow the scope of their research.

Based on the reported experiences of the research participants, Blue Hill concludes that Practical Law Connect is well-suited for legal departments of all sizes and particularly well-suited for those in-house counsel who are corporate generalists. Participants reported that Practical Law Connect was particularly valuable as a tool when they had to be prepared to change practice areas on a daily basis and be able to provide legal guidance on a wide-range of topics. As Practical Law Connect is focused on providing the research tools and guidance for corporate legal teams and transactional attorneys, the tool provides specific access to material that is curated and selected as being particularly relevant to general corporate legal teams. For those in-house counsel who need to switch topics regularly and are unable to develop subject matter expertise in any particular area, the curated material provided them with an efficient opportunity to understand the broad overview of the subject and have a guided path as they sought to better understand the subtopics within that subject area.

Organizations evaluating the business impact should focus on enhanced legal research efficiency and potential to be more efficient in their overall legal spend. Organizations reported requiring a reduced number of legal research tools utilized per matter, allowing them to streamline their research process, and being better able to manage interactions with outside counsel by having a more comprehensive understanding of the subject matter at issue.

“...The checklists allow us to make sure that we’re hitting the issues we need to hit. I spend a lot of time dealing with issues where I don’t have a lot of substantive background. I would never expect to truly master a subject at this point. Practical Law Connect gives us the confidence to know that we are hitting all of the important parts in a matter.”

Corporate Generalist
Staffing Agency
Jim Duffy
Research Analyst

Jim Duffy is a research analyst at Blue Hill Research focusing on enterprise risk management, compliance and policy management, and legal technology. Duffy is interested in using his background as a legal practitioner to translate the potential of emerging, new technologies as tools to improve the efficiency of the provision of legal services.

Duffy is an attorney licensed to practice in the Commonwealth of Massachusetts. Previously he has held roles in the Solicitor’s Office of the United States Department of the Interior; the chambers of the Honorable Timothy S. Hillman, a federal trial judge for the District of Massachusetts; the General Counsel’s Office of BJ’s Wholesale Club, Inc.; and the law office of Seth H. Salinger, a business litigation firm.

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