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Westlaw Edge UK: Three Traits that Make for an Unrivalled Lawyer

Abstract: In this article Samantha Steer looks at recent market insights as to the expectations of law firm clients, as well as the traits of lawyers, and presents key features from Westlaw Edge UK that address both aspects. She focuses on how Westlaw Edge UK can help lawyers with regard to accuracy, efficiency and confidence.

Keywords: legal information providers; legal professionals; legal databases; Westlaw Edge UK

INTRODUCTION

This article details recent market insights as to the expectations of law firm clients, as well as the traits of lawyers, and presents key features from Westlaw Edge UK that address both.

The focus will be on three key traits that clients expect from their lawyers, and that lawyers expect to demonstrate in the delivery of legal services:

- Accuracy
- Efficiency
- Confidence

And how Westlaw Edge UK can help lawyers to meet their own, and their clients', expectations in respect to these three traits.

To understand clients' expectations of their law firms, reference is made to data from Sharplegal. Sharplegal started in 2007, created by Lisa Hart Shepherd, founder of Acritas, now part of Thomson Reuters. Sharplegal was a new approach to measuring and tracking brands and market trends in the global legal sector. It covers changing buyer behaviour and expectations as to client service, taken from continuous, extensive research with senior corporate counsel.

From the lawyer's and the information professional's perspective, reference is made to insights sourced and presented by Thomson Reuters at the BIALL Annual Conference 2021 for its 'Law Librarian of the Future' presentation. Thomson Reuters also sourced insights gathered by Jinfo – a global analyst group for the information industry – as to current and emerging trends for the provision of information in the legal sector.

WHAT LAW FIRM CLIENTS WANT

In its continuous research programme interviewing senior corporate counsel, Sharplegal gathers predictions from corporate counsel for their future legal spend on

external counsel. The research looks at the on-balance proportion of corporate counsel who are anticipating their external legal spend to increase or decrease each quarter over the next 12-month period.

In the most recently analysed Sharplegal data, at a global level in Q2 2020 (peak pandemic period for most western markets), on-balance, more corporate counsel in the global market were anticipating spend decreases, driven mostly by mainland Europe and the United States.

As we moved through the remainder of 2020 and early 2021, the Sharplegal data started to see more buyers of legal services anticipating their external spend on legal services to increase – particularly in the United Kingdom (UK). On balance, in early 2021, 21% more UK client respondents expected to see an increase than those who predicted a decrease in their legal spend in the coming 12 months.

Against this backdrop of an increase in demand for legal services, as part of the Sharplegal programme, corporate counsel were asked to list the qualities they value from their law firms. For corporate counsel, the three most common qualities of the most favoured law firms are:

1. Quality advice: error-free, reliable, commercial and solutions focused;
2. Strong individuals: credentials, ability to deliver and be reliable;
3. Specialist knowledge: deep subject matter expertise.

The quality of the legal service provided is the number one driver and differentiator. General counsels (GCs) are drawn to firms that can provide those assurances that their expertise is of the highest standard.

GCs are also drawn to individuals whom they trust. Trust and reliability are huge attraction factors in an uncertain market, so law firm partners who have these qualities are positioned to do very well.

GCs want to know that they are working with the definitive experts, with specialist knowledge, during this time of incredible change in social and political

landscapes. Keeping up-to-date and on top of changes are what clients desire from their external counsel.

In addition to quality advice, strong individuals and specialist knowledge, Sharplegal noted that three qualities are growing in importance to corporate counsel in their decision-making as to which lawyers to engage:

1. Understanding of the client's business;
2. Brand reputation;
3. Industry knowledge.

Understanding of the client's business means more and more GCs are gravitating to firms that invest the time to understand what the business is trying to achieve and demonstrate that through the advice they give.

Brand reputation is linked to the comfort that clients are looking for – that they are working with firms and individuals they trust.

Industry knowledge is becoming increasingly important and an area in which law firms are heavily investing in order to try and get to grips with: how a firm can upskill its people to understand the drivers and trends of their clients' industries, so as to elevate the level of business understanding that their lawyers bring to client relationships.

KEYS TO UNLOCKING CLIENT SATISFACTION: QUALITY, EFFICIENCY AND CONSISTENCY

Sharplegal also tracks the elements of client service which have the strongest relationship with a client's overall satisfaction.

On average, law firms are delivering high levels of client satisfaction in respect to quality of advice.

In the last six months, efficiency grew in importance as a driver of client satisfaction, and in 2021 it now has a stronger relationship with a client's overall satisfaction with its law firm than the quality of advice. Quality is rated high for most firms but efficiency is not. The data shows that law firms are delivering on efficiency less successfully than on quality. Clients are desperate for their law firms to explore ways in which they can deliver work to the GC in the most efficient way possible.

Similarly, the data shows that consistency in the delivery of legal services is another area of increasing importance to GCs; however, law firms are achieving a lower-than-average satisfaction ranking from their clients.

INNOVATION: WHAT IS IT AND WHERE CLIENTS FEEL FIRMS SHOULD BE FOCUSING

Sharplegal asked GCs to state the areas in which they feel their law firms should focus their innovation efforts.

GCs were asked how important certain areas of innovation were to them, and 60% stated that innovation in pricing was very important. However, among the group of GCs who feel that they are actually receiving innovation from legal service providers, only 5% of them saw innovation in pricing, revealing a gap between where innovation is needed and where it happens.

Knowledge sharing is ranked second by GCs in importance for innovation focus for their law firms at 57% - but only 14% of GCs say they are actually seeing

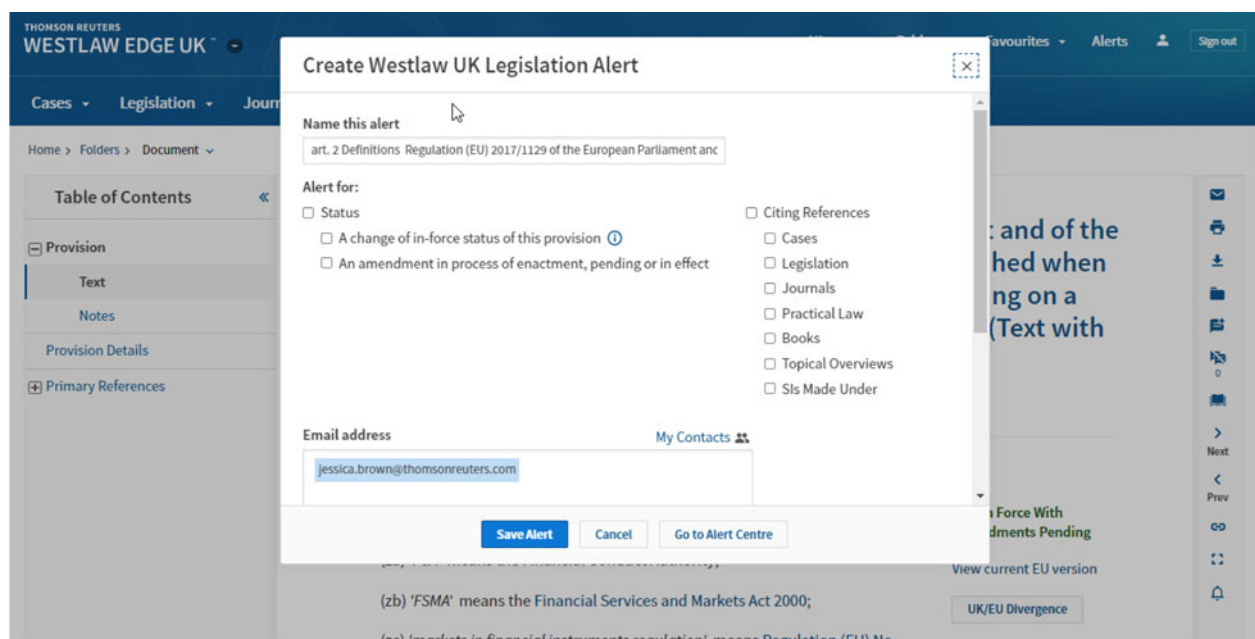


Figure 1: Alerts can be created to ensure that as soon as information about changes or amendments (pending and proposed) is available, it is sent to you via email.

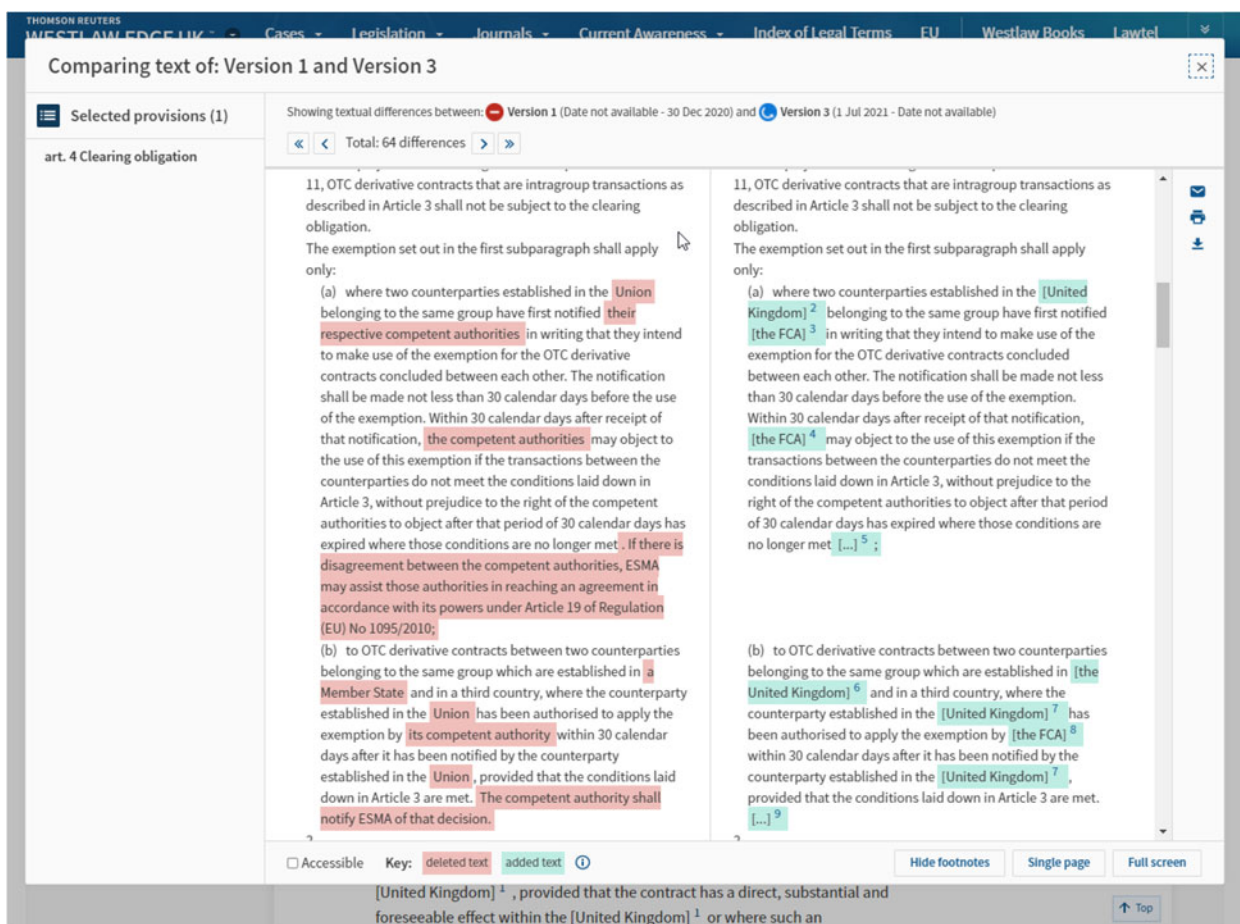


Figure 2: The Compare tool indicates the number of changes and highlights where text has been added or removed between any two versions.

innovation in knowledge sharing by their law firms. Contrast that with how many clients saw firms being innovative in respect to technology (51%) versus 14% for knowledge sharing. There is a clear call by clients to their law firms for a focus on innovation in the context of knowledge sharing.

THE INFORMATION NEEDS OF LAWYERS, CHANGES IN 2020 AND THE EXPECTED 'NEW NORMAL'

In January-February 2021, Jinfo conducted a survey among information professionals on empowering end



Figure 3: Divergence Tracker enables the comparison of any version in UK (Retained EU) legislation with any version in the timeline of the EU equivalent.

The screenshot displays the Thomson Reuters Westlaw Edge UK interface. The main content area shows the text of Regulation (EU) No 648/2012 of the European Parliament and of the Council of 4 July 2012 on OTC derivatives, central counterparties and trade repositories (Text with EEA relevance) (Retained EU Legislation) art. 4 Clearing obligation. The text is structured as follows:

Article 4 Clearing obligation

1. Counterparties shall clear all OTC derivative contracts pertaining to a class of OTC derivatives that has been declared subject to the clearing obligation in accordance with Article 5(2), if those contracts fulfil both of the following conditions:

(a) they have been concluded in one of the following ways:

(i) between two financial counterparties that [are subject to the conditions]¹ set out in the second subparagraph of Article 4a(1);

(ii) between a financial counterparty that [is subject to the conditions]¹ set out in the second subparagraph of Article 4a(1) and a non-financial counterparty that [is subject to the conditions]¹ set out in the second subparagraph of Article 10(1);

(iii) between two non-financial counterparties that [are subject to the conditions]¹ set out in the second subparagraph of Article 10(1);

(iv) between, on the one side, a financial counterparty that [is subject to the conditions]¹ set out in the second subparagraph of Article 4a(1) or a non-financial counterparty that [is subject to the conditions]¹ set out in the

The right sidebar shows a version history for the current EU version, with three versions listed:

- Version 3**: To: Date not available, From: 1 July 2021
- Version 2**: To: Present, From: 31 December 2020
- Version 1**: To: 30 December 2020, From: Date not available

Figure 4: Tracking changes pre/post-Brexit.

users. The results from the survey also formed part of the presentation, 'The Law Librarian of the Future', that was presented by Thomson Reuters at the BIALL Annual Conference in June 2021.

Information professionals were asked, 'Did you experience any changes in user needs or usage patterns in 2020?' and 'Which of these changes, if any, do you expect to continue in the 'new normal'?'. The options presented were:

- Requirements for different/new topics
- Requirements for different access points than before
- Requirements for different outputs, download reports, etc., than before
- More demand for self-service information resources
- More demand for troubleshooting and support from the information team
- Other
- No changes

Survey results revealed:

Requirements for different/new topics: 60% ranked demand for new topics as having changed in 2020, and 55% expected that requirement to continue in the 'new

normal'. Themes coming from Jinfo interviews conducted in 2020 confirmed that there was some demand for different topics than previously needed. Separately to the survey, Jinfo asked 12 information managers at UK-based large law firms about newly emerging topics of interest and these topics were mentioned: trade law (a direct result of Brexit), environmental, social and governance law, and liability and potential alignment (or not) with European Union (EU) law.

Requirements for different access points than before: 55% ranked this requirement as a change in 2020, and 51% expected that requirement to continue in the 'new normal'. Interviews conducted by Jinfo, separately to the survey, also confirmed that there were 'more needs for remote access, trouble-shooting, training on different tools, moving away from hardcopy books'.

In addition to the requirements for 'troubleshooting and support from the information team' and 'more self-service' being seen as areas of continuing change in the 'new normal' by 49% and 47%, respectively, of survey respondents, 47% expected 'requirements for different outputs, etc.' to continue in the 'new normal'.

'New outputs' is defined to include piping information into other platforms, data visualisations or other non-text results, including 'smart' summaries of information

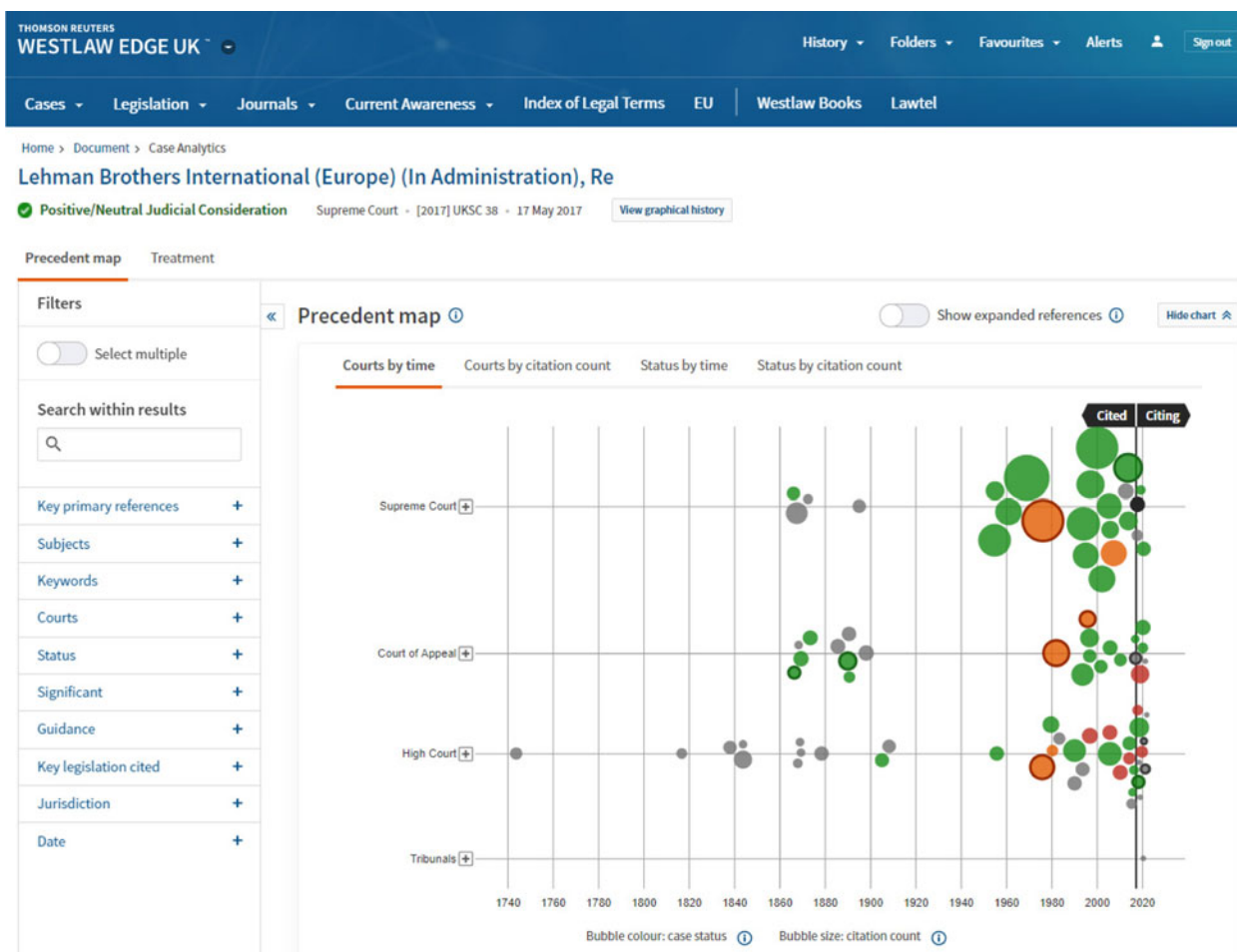


Figure 5: Case Analytics takes the list of cited cases for a given case and provides an interactive map along with other key tools to filter and manage these references.

presented by artificial intelligence (AI). 'New outputs' are often aimed at helping increase the efficiency of users of information or to reach more of the 'what does it actually mean?'.

HOW CAN WESTLAW EDGE UK HELP?

Accuracy

The Sharplegal data records the need for 'Quality advice – Error-free, reliable, commercial and solutions focused' as a client differentiator. From the lawyer's perspective, achieving accuracy includes keeping up-to-date with changes in the law and being able to research a specific point of law or legal concept. Westlaw Edge UK can help lawyers at firms in these ways:

Keeping up with changes in the law:

- Give accurate advice on changing regulations: With the pace of change of legislation, keeping on top of all changes can be a real challenge. Legislation alerts mean you are always notified of the latest information and harnessing Westlaw Edge UK's horizon scanning

capabilities, enabling you to give clients an accurate appraisal of the changes coming down the line.

- Accurately evaluate complex legislative changes: Using the Statutes Compare tool takes the guesswork out of evaluating the changing face of legislation. Use the tool to compare single provisions or see how whole acts will be impacted by a bill with a few clicks. Generating a document with all the textual changes marked up means all your effort is focused on accurately presenting the impacts to your clients.
- Give clients an accurate picture of how Brexit is changing how they operate: Using the UK/EU Divergence Tracker navigates the complexity of the two diverging regimes and identifies key documents and the differences between them. State how the laws differ and generate simple and accurate marked up documents to aid in your analysis.

Researching a specific point of law or legal concept:

- Find relevant case authorities: With Case Analytics, quickly dive into the treatment map to see exactly

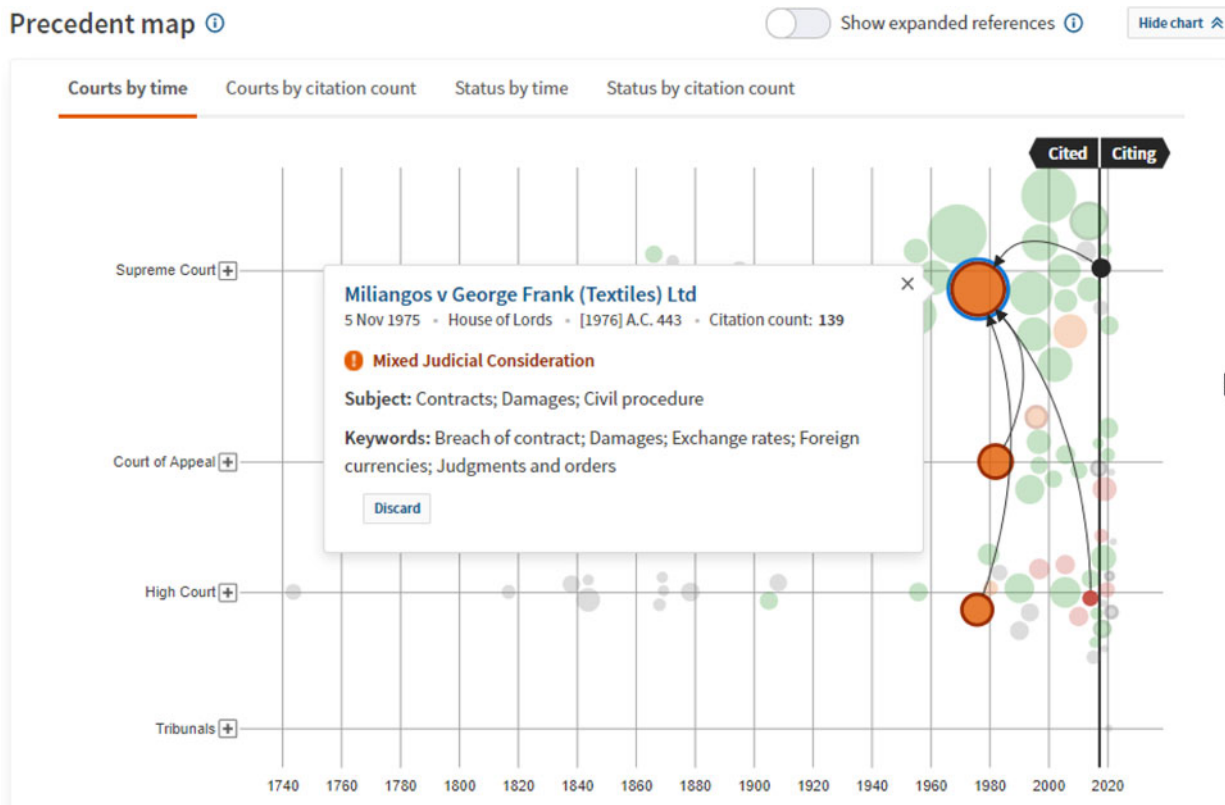


Figure 6: See shared citations and further information for any case, and choose to keep or discard items from your research.

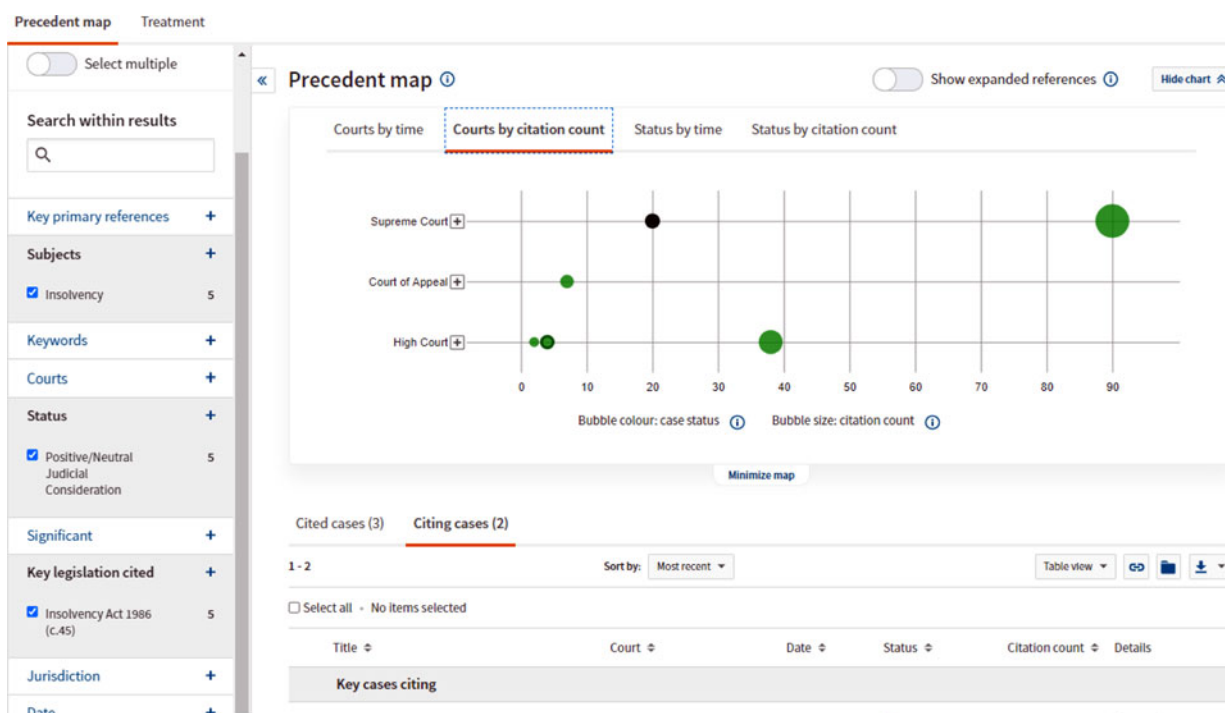


Figure 7: Use filters on the left and change the axis of the map to quickly highlight relevant cases and leading authorities.

how a case has been treated in relation to specific points. Evaluate each citation without having to read whole judgments, and build an accurate picture of the law more quickly.

- Jump straight to the authoritative statement on a topic: with Westlaw Questions, find the document you need to read to get the authoritative view on a concept or area of law.

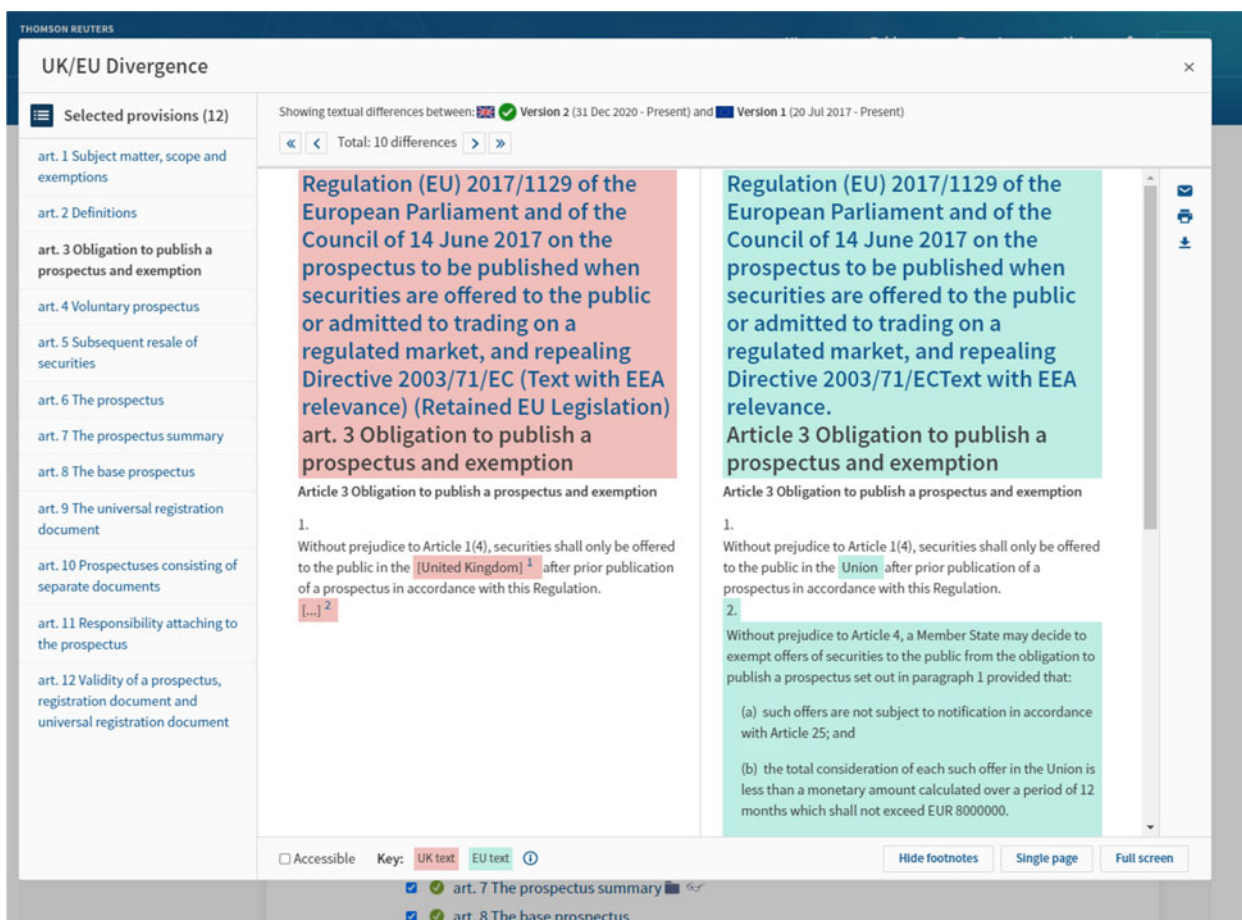


Figure 8: Multiple provisions or entire regulations can be tracked.

Efficiency

Being able to deliver legal services efficiently now has the strongest relationship with a client's overall satisfaction, but it is an area where firms are delivering less successfully than on quality of advice.

As the Sharplegal data shows, clients are demanding efficiency. They expect answers quickly. They expect the lawyer to know everything. They aren't going to pay the lawyer for doing things they think the lawyer should already know; the lawyer may want to spend days reviewing everything, but the client may not be willing to pay for that.

Many lawyers are perfectionists; the fear of making mistakes means time is spent reviewing more documents and data than is probably needed, including triple- or quadruple-checking everything. This eats up valuable time. Further, if time is being spent questioning information sources, time is not being saved. When your livelihood is based on the billable hour, as is that of the lawyer, you don't want to move hastily, but you also don't want to get trapped in a spiral of write-downs – that non-billed time you spend researching a new area of law, keeping up with changes in the law, and figuring out how they relate to your practice. Establishing efficient work

practices at a law firm directly contributes to the bottom line of the business. Therefore, arming the firm with the right tools is essential.

Westlaw Edge UK can help in these ways.

Efficiency:

- Find relevant case authorities: the Case Analytics precedent map allows you to narrow down large lists of case authorities using search terms, filtering using the Westlaw taxonomy and focusing on key relationships from a single screen. Quickly expand research using the expanded references and check authorities from thousands of cases in minutes.
- Check validity of case authorities: the Case Analytics treatment map allows you to see how a case has been treated and immediately drill down to the topics and treatment of interest, and view the citation from the judgment without ever leaving your research page.
- Update clients on regulatory changes: with Legislation Alerts, monitor provisions for any changes and simply receive a notification in your inbox. This avoids wasting time checking for updates.

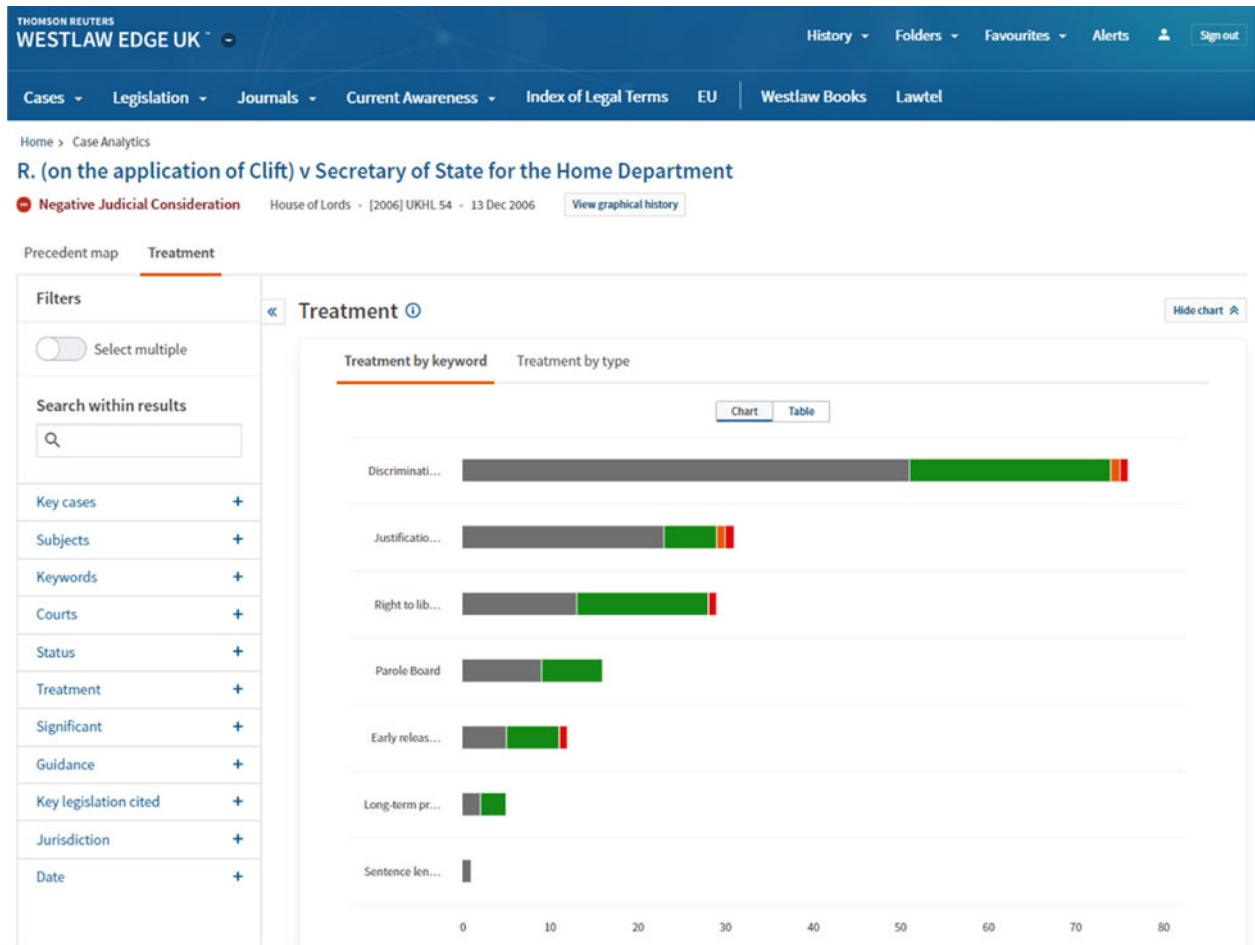


Figure 9: Use the Treatment map to see how citing cases, which share keywords with your given case, have treated your case.

- Analyse the impact of regulatory changes: see the changes across two provisions at any point in time in seconds. Check how an entire act will change in the future in a matter of clicks using the Statutes Compare tool.
- Research an unfamiliar topic: jump straight to a document from a specific question and read the highlighted paragraph to kick off your research journey without having to search and orientate yourself in a new subject area.
- Analyse different regulatory regimes: see how laws in the UK and EU are evolving by calling up the two jurisdictions and highlighting textual differences, turning research hours into seconds.

Confidence

As mentioned earlier, the top three qualities for which clients are differentiating the most favoured law firms are:

1. Quality advice: error-free, reliable, commercial and solutions focused.
2. Strong individuals: credentials, ability to deliver and reliability.
3. Specialist knowledge: deep subject matter expertise.

The Sharplegal data reveals that clients are looking for strong individuals and that means lawyers who have the necessary credentials, can deliver and are reliable. Clients also care about expertise; they look for deep subject matter expertise when engaging a lawyer.

But having expertise and projecting expertise are two different things, and it boils down to one factor: confidence. Not only is confidence of value to clients, but it's also noted by peers when evaluating their competitors, including when referring a client to another lawyer.

Westlaw Edge UK can help in these ways:

Have confidence your research is complete:

- Confidence that your authorities can be relied upon: Case Analytics ensures that even the most time-pressed researcher can complete a thorough check of authorities ensuring that they are relying on the best possible case law.
- Confidence that your case research is complete: Case Analytics provides the confidence that there is no need to check additional cases. Evaluate hundreds of cases and even discard cases from your research so you know when your research is complete.

Have confidence your research is up-to-date:

- Confidence that you are advising on the complete regulatory picture: Legislation alerting provides users with the reassurance that they are aware of changes to legislation they are monitoring. Due to the way Westlaw Edge UK incorporates prospective and draft changes, you can have confidence that you have the most complete picture possible.

Have confidence to research new areas of law:

- Confidence that you're capable of researching a new area of law at the drop of a hat: Have confidence when researching a new area of law using Westlaw Questions that you are starting from an authoritative source, making research more effective.
- Confidence that complex information is displayed logically and ready for immediate consumption: the UK/EU Divergence Tracker allows users to navigate complex content, presented in a way that allows them to home in on the areas of interest and evaluate the legal implications for their matter.

Home in on references on the same principle of law which have treated your case in a specific way.

CONCLUSION

In conclusion, GCs, on balance, are anticipating an increase in their spend on external legal services this year. This suggests that now could be the optimal time for law firms to demonstrate that their lawyers can deliver quality advice, confidently, and in the most efficient way possible. 'New outputs' of legal information, for example, data visualisation, are considered to improve efficiency in legal research and/or enable users to more readily understand 'what does this actually mean?'

When it comes to investment in innovation by law firms, GCs have indicated the areas of importance to them, including knowledge sharing. This is part and parcel of demonstrating the qualities of deep subject matter expertise and industry knowledge expected by GCs of their external counsel.

As the legal and work landscapes change, lawyers, as consumers of legal information, require more efficient and more effective access to information on new and emerging legal topics and more self-service information resources.

Westlaw Edge UK was developed to meet clients' current and predicted expectations of their external law firms, and the evolving legal research needs of lawyers and information professionals.

Biography

Samantha Steer is Director, Market Development, Large Law, Legal Europe at Thomson Reuters.