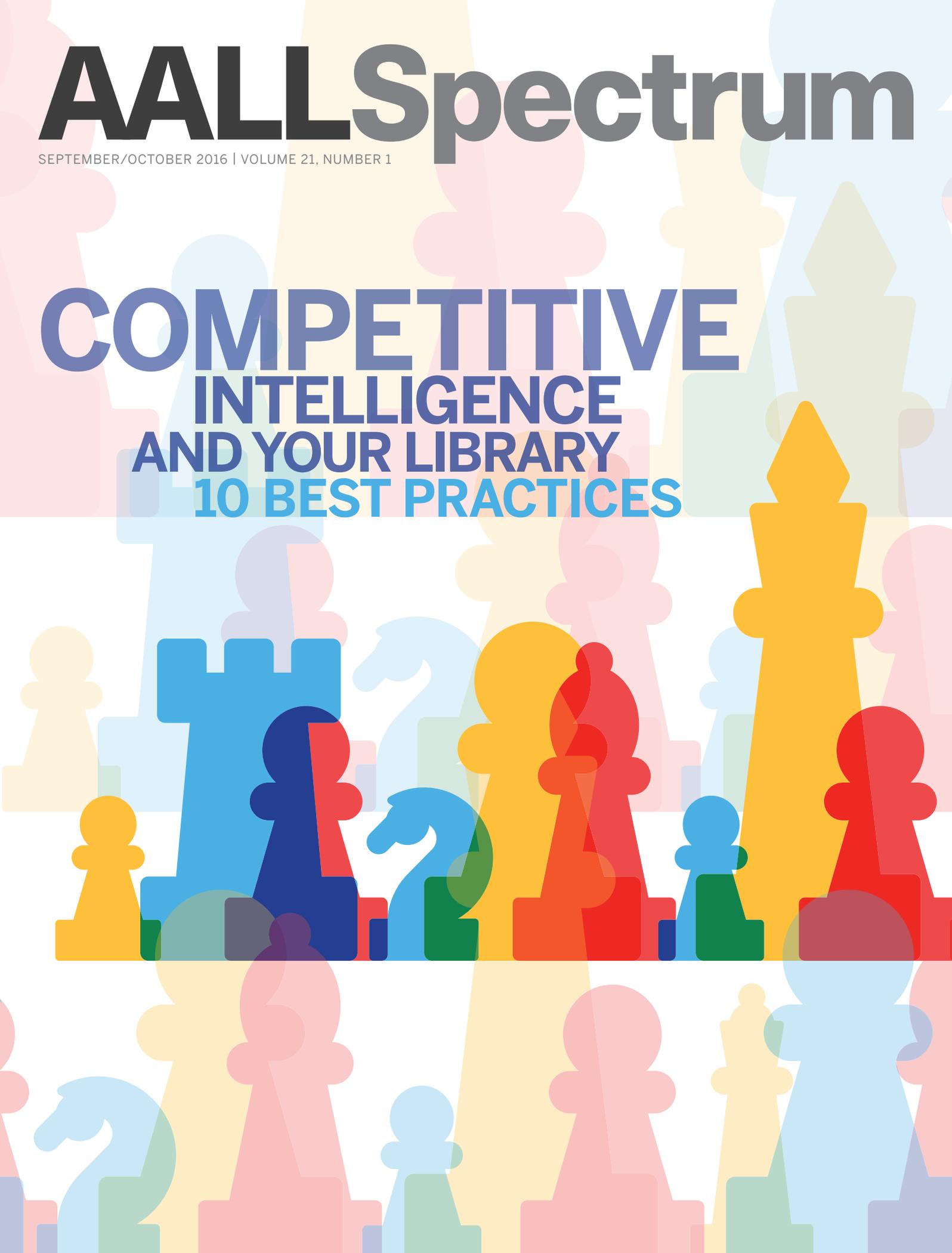


AALL Spectrum

SEPTEMBER/OCTOBER 2016 | VOLUME 21, NUMBER 1

COMPETITIVE INTELLIGENCE AND YOUR LIBRARY 10 BEST PRACTICES



VENDOR VOICE

Wolters Kluwer Reinvents the Research Process

The content provider's recently released search and retrieval platform—Cheetah—provides a faster, more efficient way to locate legal information.

Information, service, and software provider Wolters Kluwer is the result of a 1987 merger between publishers Wolters-Samson and Kluwer; however, the company's roots trace back to 1836—the year Dutch publishing house Kluwer was founded.

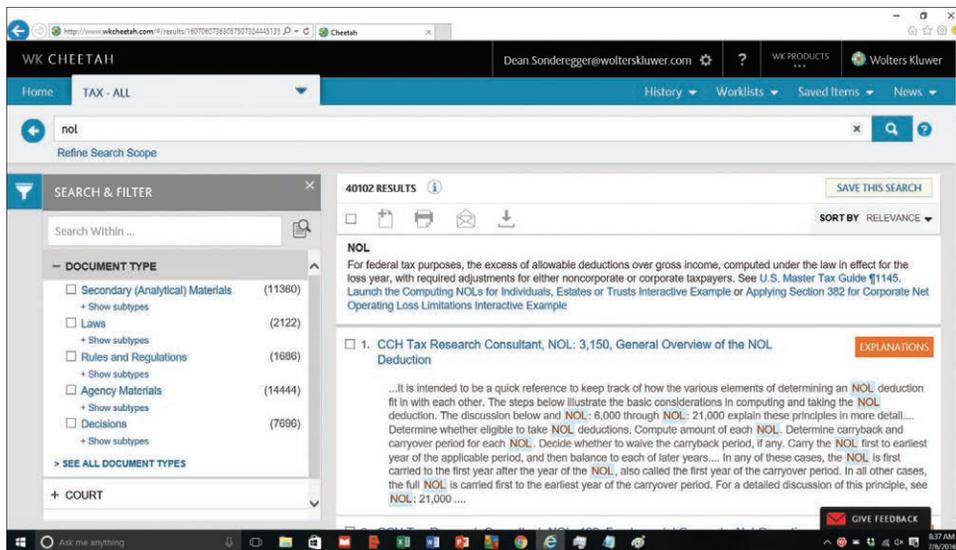
In the years since, the company has supplied reference materials for a variety of legal professionals, initially as a book publisher, and now as an online resource. In 2015, after three years of culling input from its law librarian advisory board and other legal community members, Wolters Kluwer released

its new Cheetah search platform, designed to provide faster, more accurate research.

We spoke to Dean Sonderegger, Wolters Kluwer legal and regulatory U.S. vice president of legal markets and innovation, about Cheetah's capabilities, the recent legal research evolution, and the way savvy law librarians are becoming an integral part of their firm's big-picture planning process.

Has Wolters Kluwer made any changes since opening its doors?

We've been in business for a good while. We started off as a book publisher more than



The Cheetah platform allows users to search using natural language and topic-based navigation.

who are refusing to be billed for first- and second-year associates' work. That changed the financial dynamics of the whole game.

How can law librarians emphasize the value they provide?

We've seen it done successfully when librarians are able to align themselves with the firm's strategy and get a seat at the table, in terms of driving the strategy. We've seen really remarkable things happen where firms are able to have their library assist in developing knowledge portals—typically website pages that support a particular practice group at the firm by curating information sources for attorneys—which have helped quite dramatically.

The research function is very powerful and valuable, and has to be applied in a way that helps managing partners further the firm's business goals. You have to get in front of the firm's leadership and explain how your group understands the firm's strategy for growth and retention, and where the library fits within that.

Your latest search platform, Cheetah, was introduced last spring. How can it help improve output and provide additional value?

The new platform came out of the mouths of customers. We have an advisory board that is, in large part, law librarians, who basically said to us, "You know what, you have great content, but we're not able to get to it in the way we'd like. You're suffering because of that; you need to invest in a new platform." Our CEO was in the advisory board meeting, and we sat down immediately after and said, "OK, we've got to fix this. How do we do this?"

It's a much more useable experience. You can print out a portion of the document, or forward it to a client or an attorney you're working with. The idea is, 'I want to give you a good reading experience online'—something

100 years ago, but as customers' needs changed, we transformed to meet them. Today our focus is on offering expert solutions digitally, which includes information and productivity solutions.

In the U.S. in the 1970s and 1990s, Wolters Kluwer acquired two brands—Aspen Publishing and CCH—that a number of attorneys grew up on, and migrated that content to the Wolters Kluwer brand. Today, Wolters Kluwer's tagline is "When you have to be right." Our goal is to provide essential information to attorneys to ensure they are in compliance with laws and statutes, and to help them do that faster and become more efficient to get a better outcome for their clients.

Has the switch to digital publishing been a widespread trend in the legal industry?

All publishers went through a period of time where they took their existing portfolio of content and made it available—first on CD-ROM, then eventually through a web-based presence.

The idea originally was to digitally browse through the table of contents like a book. The feedback we get from people is that they want to access essential and actionable content in a time-sensitive fashion, and also be confident the content they discovered is accurate.

Did the Great Recession influence the need to reduce research time?

Corporate legal departments tend to be in-sourcing a lot of activities that typically went outside. It's a much more competitive environment to get corporations' outside spend, which means firms have to be better, faster, and cheaper. We've seen firms looking very hard at their budgets to make sure they're being cost-efficient with content, and a lot of energy is going into business development. You absolutely see legal librarians being asked to do research on companies a firm is doing business with as well as research on competitors and prospective companies.

We've seen increased billing and rate pressure in certain law firm markets. It's harder than it used to be to charge research back to the client. They have an expectation that you already know how to do these things, and time should be spent drafting the work, not researching the issue. We've also seen an increased prevalence of fixed fee engagements. You're basically trying to do the job as well, but also as quickly, as possible.

I wouldn't characterize legal research as ever having been leisurely, but the increased pressure to do things other than research without the luxury of charging hourly for research has really amped up the urgency associated with it. There's an additional element—you're seeing more demanding clients

that's easy to navigate ... and easy to annotate. The platform does a very nice job of laying that out and allowing the attorney to understand when something was last updated or reviewed.

We've tracked user activity in the system and seen from IntelliConnect, our previous platform, that Cheetah customers are spending more time in the content and less time navigating. That was very much one of our goals. It's rewarding to look at the user statistics and see what we're doing manifest itself on the back end.

Who typically uses the product?

Certainly, the law libraries in both academic and professional environments—both law firms and corporate

legal environments, as well as practicing attorneys. We tend to be more focused around transactional law, but it's a mixture of what lawyers practice.

What type of information can users access with Cheetah?

The secret sauce is that our editorial team will organize the content and highlight the essential pieces; the commentary adds value. The result is that practitioners are able to move through primary content more efficiently.

That's the reason why you see such a move toward a strong digital presence and platform. Some documents and books are three volumes with 1,000 pages per volume; that gets to be very big. The whole set is good stuff, but legal professionals are probably not reading it cover to cover. They're looking for a specific topic—how can they get the most relevant thing as quickly as possible?

You need to find ways to provide additional insight to things—assess a situation and connect the dots, if you will. I get much more efficient at my job as a researcher if something is telling me things I need to know about the context of the research I'm doing. That's helping me remove risk or understand what the other party is hoping for so I can get the best agreement for my client.

How did you determine which features Cheetah should include?

We actually did a huge amount of outbound research. We worked with a third-party research company. We talked with attorneys to ask about certain tasks they do; we went by practice area and tried to get a decent cross-section—probably no less than 20 working attorneys from large- and medium-sized law firms to get different perspectives.

Did any of their suggestions surprise you?

A couple of things jumped out. One, we spent an awful lot of time in the first iterations trying to create a browseable view of the table of

contents, and overwhelmingly, we heard that they didn't have time to browse things. They wanted to type in a search term and get something meaningful back.

The other thing that was a surprise was we got all these comments saying, "You have these Smart Charts around state securities law; I really love the new content you added"—but the firm had been subscribing to it for a while. That highlighted a problem we had. You had to really know a lot about the content to find it. We found value in our existing portfolio that customers weren't accessing.

Oddly enough, we got feedback that B2C sites had surpassed B2B sites in their utility. I always use Amazon as an example. Searching for something is a great experience: You type in a search term, can sort and filter the results, and see what other people have bought or looked at. We tried to take some of those concepts and put them into the experience so it feels familiar and is easy to use. People don't have a lot of time and want to get the content as quickly as possible.

What is the biggest challenge legal researchers face today?

The biggest challenge is that too much content is available. Attorneys are going through a sea of stuff. Finding what's relevant, and correct, is a challenge in a lot of cases. For librarians, as you see the quality of research tools improve, there's an ongoing pressure for the library to remain relevant to the organization. There can be an assumption that a basic search provides an answer. I see strong libraries developing knowledge management capabilities, curating knowledge for attorneys so they can be more effective at delivering services.

When librarians get involved, they're pulling together more insight. Research used to be more of a throw-it-over-the-wall-type thing; you got a request, you came back with more data. Librarians are now empowering associates (or whoever needs the research) and taking a more active role. It's become more of a partnership. ■

WOLTERS KLUWER BASICS

Founded

1987 (in its current form)

Registered Users

600,000

Products

Legal research platform Cheetah; RBsourceFilings, used for SEC research and analysis; and the Almanac of the Federal Judiciary, profiles that list federal circuit court judges' likes, dislikes, and other qualitative feedback.

Company Highlights

1978: Acquisition of Aspen Publishing

1987: Wolters-Samson and Kluwer merge to become Wolters Kluwer

1985: Operations start in China

1989: Launch of the legal information system LEX in Poland

1996: Acquisition of CCH Inc.

2012: Approximately three-quarters of the company's revenue comes from online software and services

2016: Cheetah platform is released
