

# Westlaw Precision Investor Webcast

November 28, 2022

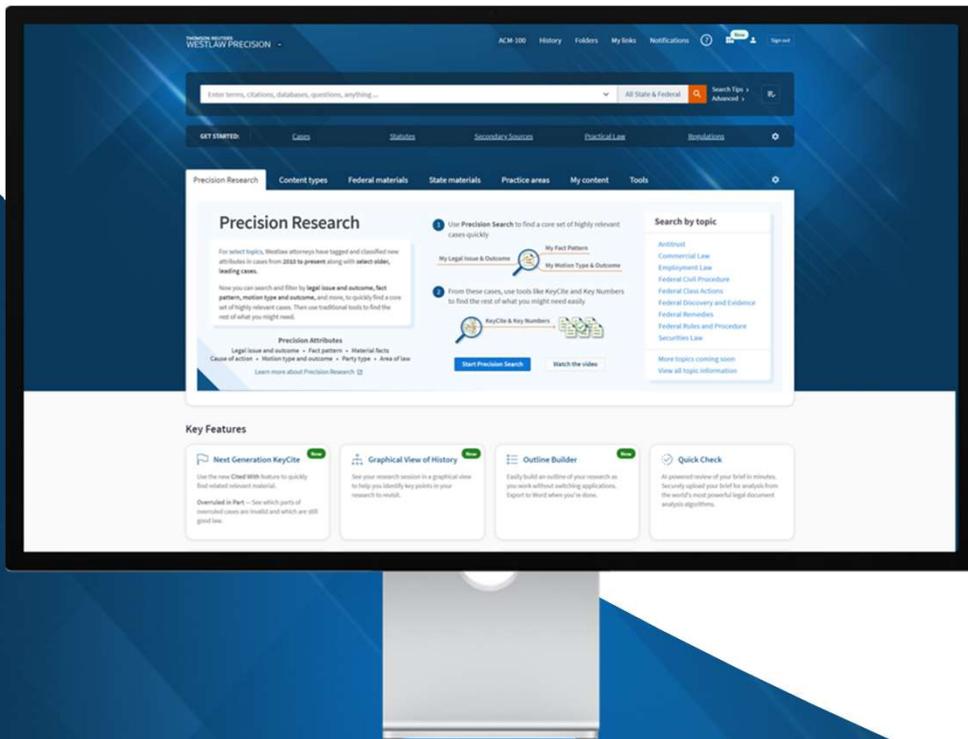
## Special Note

### **Special Note Regarding Forward-Looking Statements, Material Assumptions and Material Risks**

This presentation consists of these slides and the associated remarks and comments, which are related and intended to be presented and understood together.

Certain statements in this presentation and discussion are forward-looking, including, but not limited to, statements regarding the expectations of future financial and operational performance of the company and its individual business segments, including the expected growth and profitability of Westlaw and the company's Legal Professionals segment. While the company believes that it has a reasonable basis for making forward-looking statements in this presentation, they are not a guarantee of future performance or outcomes and there is no assurance that any of the events described in any forward-looking statement will materialize. Forward-looking statements are subject to a number of risks, uncertainties and assumptions that could cause actual results or events to differ materially from current expectations. Many of these risks, uncertainties and assumptions are beyond our company's control and the effects of them can be difficult to predict. Some of the factors that could cause actual results to differ materially from current expectations are discussed in the "Risk Factors" section of our annual report, our third-quarter 2022 management's discussion and analysis (MD&A) and in other materials that we from time to time file with, or furnish to, the Canadian securities regulatory authorities and the U.S. Securities and Exchange Commission.

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## Speaker Bios



**Paul Fischer**  
President, Legal  
Professionals



**Mike Dahn**  
Head of Product,  
Westlaw



**Jessica Platt**  
VP – Sales & Client  
Management, Global  
& Large Law Firms



**Andy Martens**  
Head of Research  
Product & Editorial

# Westlaw History of Innovation and Market Leadership

**Andy Martens**

Head of Research Product & Editorial

# Attorney Editors + Technology = Value

## Westlaw's 150+ years of customer-inspired innovation

**1872:** John B. West Publisher and Book Seller founded

**1879:** West National Reporting System was launched and became standard for legal practitioners

**1927:** West indexes all US Law. Launches US Code Annotated



**1975:** Westlaw is computerized into West Automated Law Terminal (WALT).



**1997:** Westlaw revolutionized citator research with launch of KeyCite

**1998:** Westlaw.com launched as 1<sup>st</sup> web-based version of WL

**2018:** Westlaw Edge introduces AI/ML capabilities to Westlaw

**2019:** Launched Quick Check

1872

2020 - 2022

**1876:** West begins publishing The Syllabi



**1908:** West Key Number System created



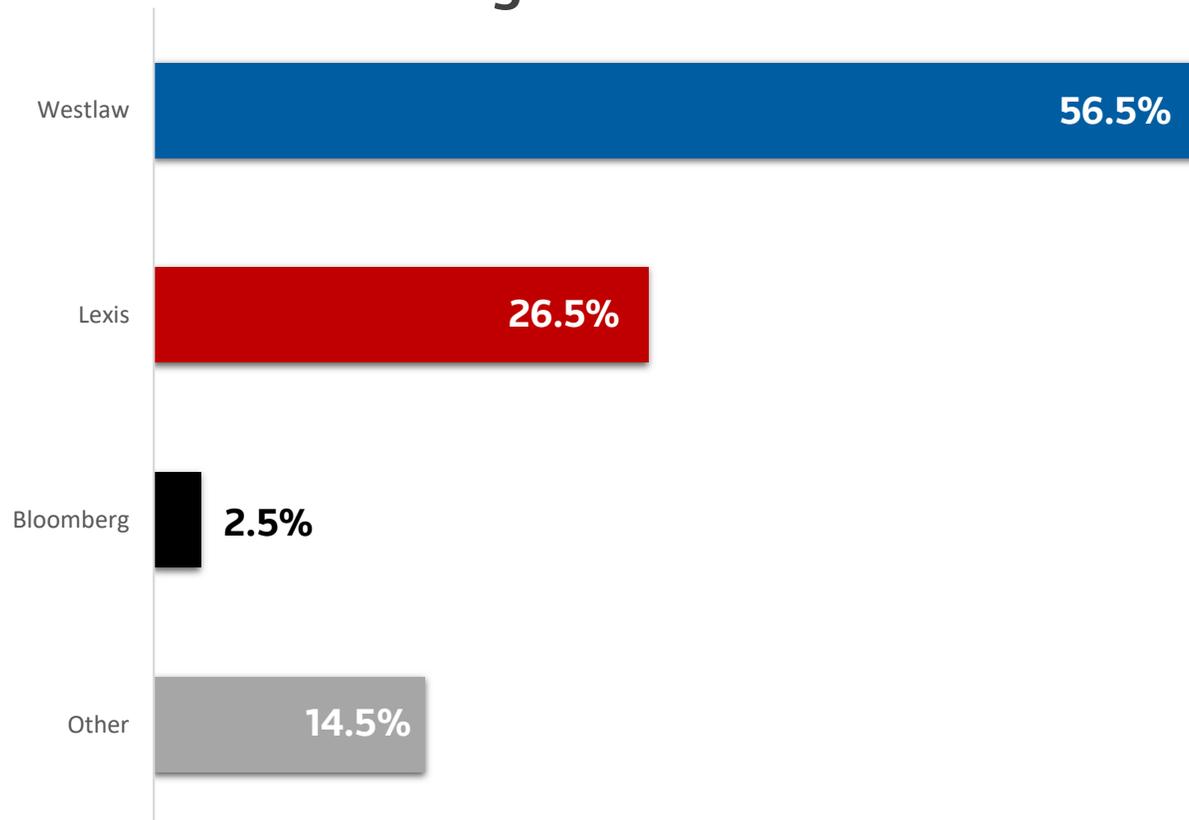
**1992:** Westlaw is Natural launched: first commercially available legal search engine

**2010:** Westlaw Next increased accuracy in legal research

THOMSON REUTERS  
WESTLAW PRECISION

## American Bar Association Tech Survey – 2022

“Which ONE fee-based online service do you use most often overall for legal research?”



# Westlaw Precision In-Depth

**Mike Dahn**

Head of Product, Westlaw

# Difficulty and Time Needed For Legal Research

Average Difficulty of Legal Research Conducted	Total	US by Segment				
	(n=152)	Small Law Firms (n=30)	Midsize Law Firms (n=31)	Large Law Firms (n=34)	Corporate Counsel (n=35)	Government (n=22)
		D	E	F	G	I
	<b>Easy</b>	31%	28%	38%	24%	33%
<b>Moderate</b>	34%	40%	30%	33%	35%	32%
<b>Difficult</b>	35%	32%	32%	43%	32%	37%
Average Hours Typically Spent on Difficult Research	12.1	8.4	11.1	22.4	6.4	11.5

# Westlaw Precision Solves the Big Issues of Legal Research

## Traditional legal searching is inexact

- **Important cases can be missed** because **different language** is used

Searched for "causal connection"  
But case only mentions "causal link"

- **Irrelevant cases can inundate results** because they use the searched language in a **different context...**

Case mentions "poor performance," but not for the legal issue the attorney is interested in.

**c. Causal Link**

46 The Court thus must determine whether Plaintiff has raised a triable issue of fact as to whether there is a causal link between Plaintiff's demotion in September 2011 and her protected activity. Courts may infer the requisite causal link from "the proximity in time between the protected activity and the adverse action." See *Dawson v. Entek Int'l*, 630 F.3d 928, 936 (9th Cir.2011). Plaintiff's complaint regarding her pay disparity was closed on May 18, 2011. (Dkt. No. 73-15, Ex. 1.) Although it is unclear when Ms. Marvin-Nilson made the decision to implement the TAS Process for the security supervisor position, it had to have occurred sometime between April 2011 when she took over managing the department and mid-August when Ms. Marvin-Nilson told Plaintiff and the other two supervisors that they were going to have to re-apply for their positions. (Dkt. No. 73-6 at ¶ 9.) Ms. Marvin-Nilson's declaration indicates that Plaintiff mentioned the pay disparity complaint to her sometime in late June. (Dkt. No. 73-6 at ¶ 22.)

47 A several-month gap in time does not provide the requisite causal link. See *Clark County School Dist. v. Breeden*, 532 U.S. 268, 273, 121 S.Ct. 1508, 149 L.Ed.2d 509 (2001) (stating that "[t]he cases that accept mere temporal proximity ... hold that the temporal proximity must be very close" and citing cases where a gap of three to four months was found insufficient). Thus, while "causation can be inferred from timing alone," such an inference can only be made if the adverse action occurred "on the heels" of protected activity. *Villorimo v. Aloha Island Air, Inc.*, 281 F.3d 1054, 1065 (9th Cir.2002). Here, the gap in time could have been as great as four months or as little as one. Drawing all inferences in Plaintiff's favor, as the Court must at this stage, the Court concludes that causation could be inferred from the temporal proximity between Plaintiff advising Ms. Marvin-Nilson of her pay complaints and Ms. Marvin-Nilson's decision shortly thereafter to put the supervisor position through the TAS process and Plaintiff's subsequent demotion. Plaintiff has thus stated a prima facie claim for retaliation under Title VII.

**d. Legitimate Reason for Demotion**

48 Defendant has, however, articulated a legitimate, non-discriminatory reason for its actions; that is, Plaintiff's poor performance during the interview. Accordingly, for the same reason Defendant has satisfied its burden to demonstrate that Plaintiff was demoted for a legitimate nondiscriminatory reason with respect to Plaintiff's age discrimination claim, Defendant has satisfied its burden with respect to Plaintiff's retaliation claim.

**CONCLUSION**

For the reasons set forth above, the Court GRANTS Defendant's Motion for Summary Judgment.

# Westlaw Precision Research

- We added 250 attorneys to our editorial staff and have **marked up and classified** cases in far greater detail.
- Because attorney editors classify a wide variety of language to common issues and fact patterns, customers can **find the right cases even if the cases use different language.**
- And with the new markup, customers can search just the parts of the document most relevant to their search, like material facts or party type, resulting in **far fewer irrelevant cases.**

Cases tagged for law, facts, and outcomes by topic

**c. Causal Link**

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**CONCLUSION**

For the reasons set forth above, the Court GRANTS Defendant's Motion for Summary Judgment.

**Legal Issue**

**Material Facts**

**Issue Outcome**

**Party Type**

**Cause of Action**

**Motion Type**

**Motion Outcome**

Content types	Filters
Set default	
Overview	15
<b>Cases</b>	<b>285</b>
Trial Court Orders	21
Statutes & Court Rules	38
Secondary Sources	186
Practical Law	1,075
Regulations	32
Public Records	
Administrative Decisions & Guidance	10,000
Arbitration Materials	8,767
Briefs	98
Expert Materials	3,054
Forms	0
Jury Verdicts & Settlements	881

## Cases (285)

1 - 100 > Sort: Relevance >

Select all items • No items selected

Related documents

1. **Group One Ltd. v. GTE GmbH**  
United States District Court, E.D. New York. • February 03, 2021 • 523 F.Supp.3d 323 • 2021 WL 1727611

PATENTS — **Processes. Service** via **email** comported with due **process**, in infringement action brought by patentee against German corporation and its chief executive officer.  
[▶ Show synopsis](#)

< 1 - 3 of 182 snippets >

...On September 23, 2020, Defendants filed a **motion to dismiss** for **lack of personal jurisdiction** and insufficient **service of process** pursuant to Rules 12(b)(2), 12(b)(4), and 12(b)(5), (Defs.' Mem.; Defs.' Reply), and Plaintiff opposed, (Pl.'s Opp'n)...

...For the foregoing reasons, the Court grants the **motion to dismiss** and dismisses the action against Weigel pursuant to Rule 12(b)(2) for **lack of personal jurisdiction** and denies the **motion to dismiss** the action against GTE for insufficient **service of process**...

...For the reasons explained below, the Court grants the **motion to dismiss** the case against Weigel pursuant to Rule 12(b)(2) for **lack of personal jurisdiction** and denies the **motion to dismiss** the claims against GTE pursuant to Rule 12(b)(5) for insufficient **service**...

2. **Bazarian International Financial Associates, L.L.C. v. Desarrollos Aerohotelco, C.A.**  
United States District Court, District of Columbia. • February 07, 2016 • 168 F.Supp.3d 1 • 2016 WL 471273

LITIGATION — **Process. Service of process** upon Venezuelan citizen and entities through e-mail and registered mail was appropriate.

Group One

Bazarian

Identity  
Stronghold

Fru Veg

Halliburton

Molex

NBA

Cottelli

11 cases directly on point for the  
precise issue and outcome

Eight are in the first 100. Reading through the first 100  
cases, at two minutes per case, takes about **three hours**.

Enter terms, citations, databases, questions, anything ... All Federal Search Tips > Advanced >

- GET STARTED: [Cases](#) [Statutes](#) [Secondary Sources](#) [Practical Law](#) [Regulations](#)

- Precision Research [Content types](#) [Federal materials](#) [State materials](#) [Practice areas](#) [My content](#) [Tools](#)

# Precision Research

For **select topics**, Westlaw attorney editors have tagged and classified new attributes in cases from 2010 to **present** along with **select older, leading cases**.

Now you can search and filter by **legal issue and outcome**, **fact pattern**, **motion type and outcome**, and more, to quickly find a core set of highly relevant cases. Then use traditional tools to find the rest of what you might need.

### Precision Attributes

- Legal issue and outcome
- Fact pattern
- Material facts
- Cause of action
- Motion type and outcome
- Party type
- Area of law

[Learn more about Precision Research](#)

- 1 Use Precision Search to find a core set of highly relevant cases quickly



- 2 From these cases, use tools like KeyCite and Key Numbers to find the rest of what you might need easily



[Start Precision Search](#)

[Watch the video](#)

### Search by topic

- Antitrust
- Arbitration **New**
- Commercial Law
- Employment Law
- Federal Civil Procedure
- Federal Class Actions
- Federal Discovery and Evide...
- Federal Remedies
- Insurance **New**
- Securities Law

[More topics coming soon](#)  
[View all topics information](#)

## Precision Search

Find and combine Precision Attributes below to search for cases specifically relevant to your matter.

Jurisdiction: **All Federal**

Search all   Search by attribute

### Search for Precision Research Attributes

service of process

Area of law ⓘ

All

- Service of Process**
- Abuse of Discretion
- Cause for Extension to Serve
- Cause for Failure to Timely Serve
- Cure Defective Service
- General Determination
- Good Cause to Refuse Waiver
- Prejudice to Party
- Proof of Service
- Request for Admissions
- Substitution
- Sufficiency of Method

Selections • 363 cases

Clear all

### Legal issue

- Service of Process ×
  - Sufficiency of Method ×
    - Outcome - Insufficient ×
    - Outcome - Sufficient ×

View 363 cases

Cancel

## Precision Search

Find and combine Precision Attributes below to search for cases specifically relevant to your matter.

Jurisdiction: **All Federal**

Search all Search by attribute

### Search for Precision Research attributes

Area of law ⓘ

service of process

All

Sufficiency of Method

Sufficient

Insufficient

Timeliness

Waiver

### Fact pattern ⓘ

Service of Process

Alternate Method

At Place of Business

At Residence

Selections • 180 cases

Clear all

### Legal issue

Service of Process

Sufficiency of Method

Outcome - Sufficient

View 180 cases

Cancel

## Precision Search

Find and combine Precision Attributes below to search for cases specifically relevant to your matter.

Jurisdiction: **All Federal**

Search all Search by attribute

Search for Precision Research attributes

Area of law ⓘ

email



All

Fact pattern ⓘ

- Email Communication
- Representation, Promise or Misrepresentation
  - Email
- Service of Process
  - Social Media or Email Service

Cause of action ⓘ

- Commercial Electronic Mail Act

Material facts ⓘ

Selections • 23 cases

Clear all

Legal issue

- Service of Process X
  - Sufficiency of Method X
  - Outcome - Sufficient X

Fact pattern

- Service of Process X
  - Social Media or Email Service X

View 23 cases

Cancel

## Precision Search

Find and combine Precision Attributes below to search for cases specifically relevant to your matter.

Jurisdiction: All Federal

Search all Search by attribute

Search for Precision Research attributes

Area of law ⓘ

Q motion to dismiss personal



All

Motion type ⓘ

Motion to Dismiss for Lack of Personal Jurisdiction

Material facts ⓘ

Add "motion to dismiss personal" as material facts. [Add](#)

Selections • 10 cases

[Clear all](#)

### Legal issue

Service of Process



Sufficiency of Method



Outcome - Sufficient



### Fact pattern

Service of Process



Social Media or Email Service



### Motion type

Motion to Dismiss for Lack of Personal Jurisdiction



[View 10 cases](#)

[Cancel](#)

Content types Filters <

---

Content type: Cases (10)

Select multiple filters

[Restore previous](#) [Clear](#)

---

Search within results

Documents  Material facts

---

**Precision filters** ⓘ

- Legal issue & outcome >
- Fact pattern >
- Cause of action >
- Motion type & outcome >
- Party type >
- Area of law >
- Jurisdiction +
- Date +
- Reported Status +
- Procedural Posture +
- Judge +

1 - 10

Sort: Relevance ▾

Select all items • No items selected

1. **Rio Properties, Inc. v. Rio Intern. Interlink**  
United States Court of Appeals, Ninth Circuit. • March 20, 2002 • 284 F.3d 1007 • 2002 WL 431915

Show synopsis ▾

Did alternative means of service of process satisfy due process requirements? Yes

Legal issue: Service of Process > Sufficiency of Method

[More cases on this issue](#)

**Material Facts**

Headnote 12

- District court authorized service by e-mail address listed on entity's website
- Entity had neither an office nor a door, but only a computer terminal
- Entity had designated its e-mail address as its preferred contact information

**Causes of Action**

Lanham Act • Trademark > Infringement

**Motion Type**

Motion to Dismiss for Lack of Personal Jurisdiction > Denied, Upheld

2. **NBA Properties, Inc. v. Partnerships and Unincorporated Associations Identified in Schedule "A"**  
United States District Court, N.D. Illinois, Eastern Division. • July 15, 2021 • 549 F.Supp.3d 790 • 2021 WL 2986303

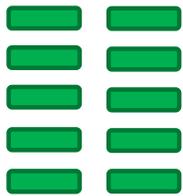
Show synopsis ▾

Was electronic service proper? Yes

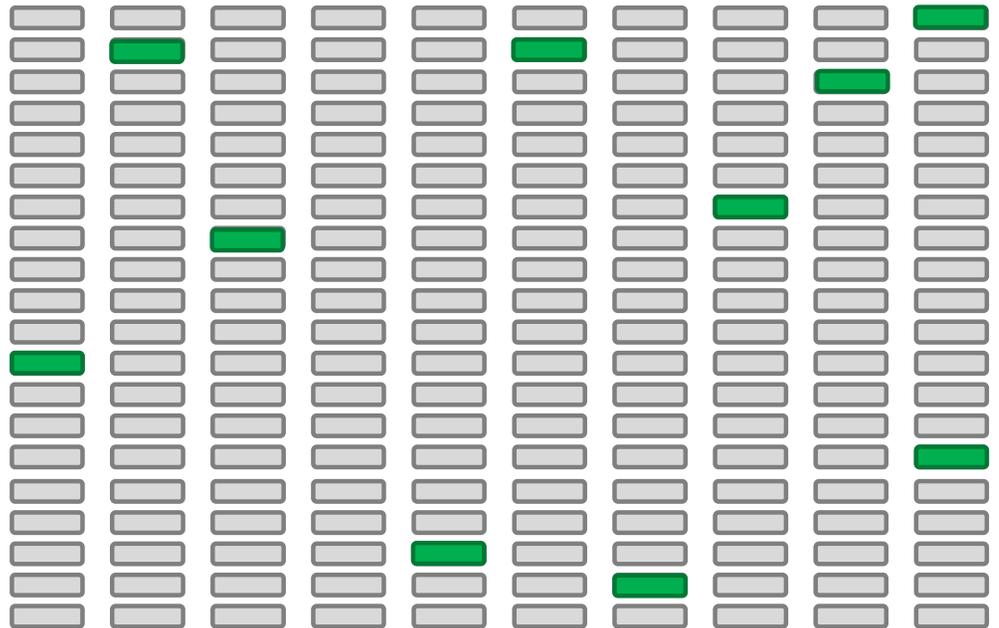
[↑ Back to top](#)

## Dramatically faster review of case results

10 of 10



10 of 200



# Results

## Traditional Research 4.75 Hours

### Step 1

Run search and review 87 cases – 3 hours

### Step 2

Locate Key Number, and review 135 headnotes – 45 Min

### Step 3

Read and follow citation networks – 1 hour

## Precision Research 1.75 Hours

### Step 1

Specify legal issue, outcome, and fact pattern, and review focused, highly relevant results – 45 minutes

### Step 2

Read and follow citation networks – 1 hour

- Fewer steps
- Less time spent
- Lower risk of running out of time
- Lower risk of missing an important case

Classification by our attorney editors enables researchers to easily find relevant cases despite the wide variety of language courts use

ATTRIBUTE	CLASSIFICATION	COURT'S LANGUAGE
Legal Issue	Reasonable Reliance	"...[defendant's] conduct <b>exceeded justifiable reliance</b> ..."
Fact Pattern	Failure to Deliver Goods	"... <b>never received</b> the package..." "...The shipment <b>did not arrive</b> ..." "... <b>None</b> of these orders <b>were filled</b> ..."
Cause of Action	Breach of Implied Contract	"... <b>obligations outside</b> the plain terms of <b>the express contracts</b> ..."
Motion Type	Motion to Dismiss	"...We <b>affirm the dismissal</b> of the complaint..."
Party Type	Athlete	"...a <b>professional swimmer</b> and Olympic gold medalist..."

# Performance Testing with 101 Attorneys

When using **Westlaw Precision**, attorneys were

***twice as fast***

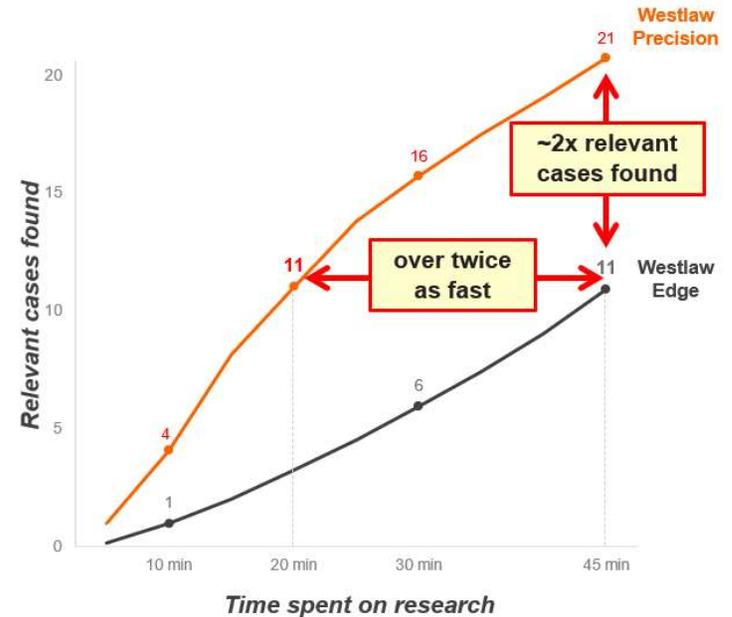
and could find

***twice as much***

compared with using Westlaw Edge

- 101 practicing attorneys conducted 1.5 hours of research, first using Westlaw Edge, then using Westlaw Precision (with different research questions)
- At just 10 minutes into the test, users of Westlaw Precision found **3 times as many** relevant cases for their question

## Quality & Speed Differences



**Speed**



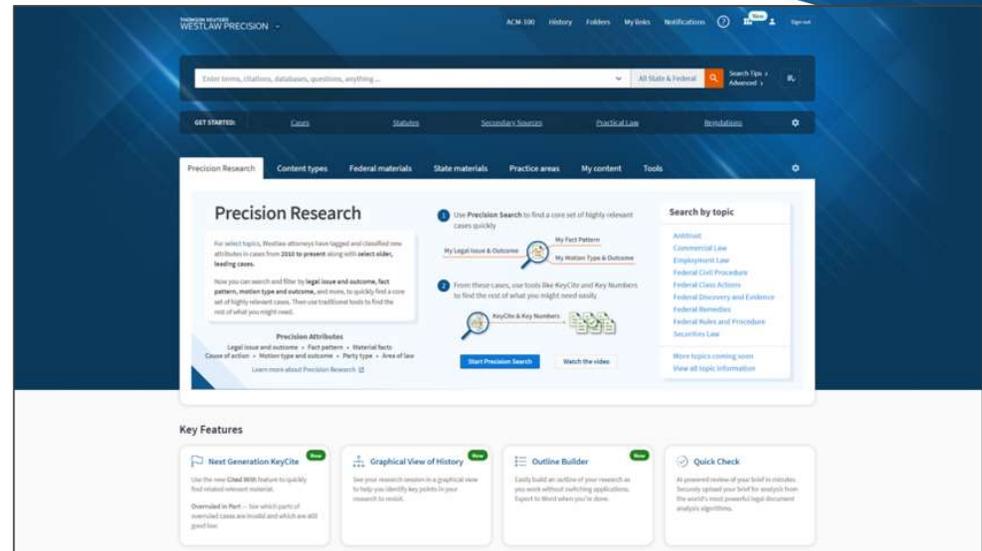
**Quality**

Launched  
September 2022

# Westlaw Precision

The fastest way to find what you need

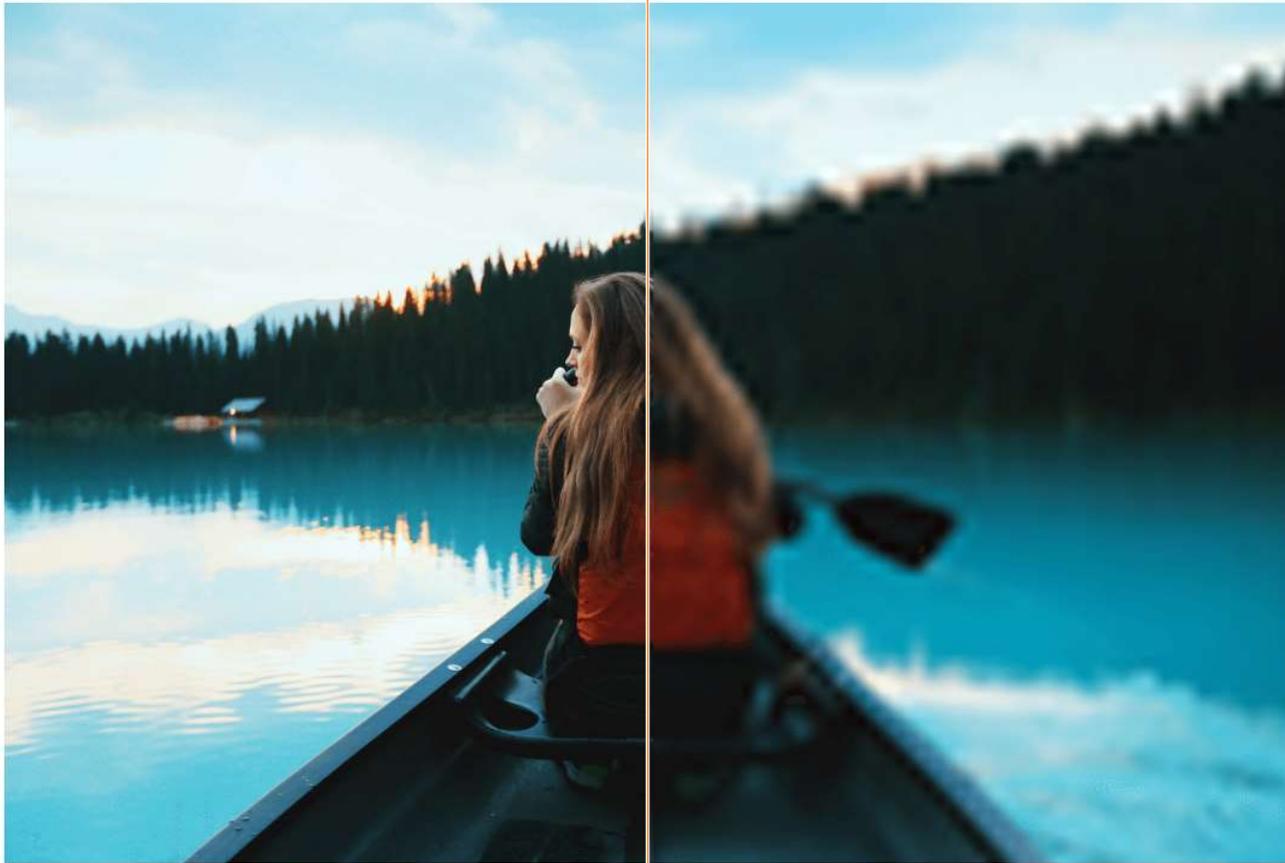
- **Precision Research**  
Dramatically more precise searching, filtering, and browsing by topic enables higher quality results in half the time.
- **KeyCite Cited With**  
Shows which cases have been cited close to a case and provides adjustment by proximity, which is a great new tool for finding additional relevant cases.
- **KeyCite Overruled in Part**  
Shows the precise parts of cases that are no longer good law and which parts are still valid.
- **Graphical History**  
Graphical view of research history enables researchers to navigate complex research sessions quickly.



- **Keep / Hide Details**  
Speeds up iterative searching by enabling researchers to easily see what they've deemed relevant or not in prior searches
- **Outline Builder**  
Enables easy creation of research outlines with drag-and-drop and auto-citation insertion to reduce frequent context switching between Westlaw and Microsoft Word.



## Growing Moat With AI + Editorial



*High resolution*

*Low resolution*

AI looks for patterns. With less detailed data, it is more difficult for AI to find the right patterns or distinguish between similar situations.

# Client Reaction

**Jessica Platt**

VP – Sales, Client Management & Productivity, Global & Large Law Firms

# Westlaw Precision: Client Reaction

## Westlaw Precision

The fastest way to find what you need

**Reaction #1: The Precision Effect**

**Reaction #2: Precision Search, Plus**

**Reaction #3: Consistent & Unprompted Feedback**

## Customer Experience

It's like the Westlaw team was in my head and **reading my mind** when developing Precision.

- Law Firm Associate

Westlaw Precision would make me a **better partner to outside counsel**, and it could better the results in cases that are litigated... I believe ultimately it would make me a better attorney.

- Corporate Counsel

**Precision Research is leaps and bounds ahead** of anything else I've used in terms of identifying on-point case law.

- Law Firm Associate

KeyCite Cited With definitely **found things I might not have run across** otherwise and certainly in less time.

- Court staff attorney

One of the reasons we choose to continuously partner with Thomson Reuters and to be early adopters for the products you bring us is because **you are changing the game that others are just not even coming to play in.**

- Global Law Firm CKO and Client Value Officer

# Closing Remarks

**Steve Hasker**

CEO

# Key Takeaways

1. Westlaw Precision is a great example of what TR does best: Content Enabled Technology
2. Westlaw = market leader with wide moat and strong competitive advantages
3. Westlaw Precision provides a significant step up in capability and value
4. Westlaw remains an important contributor to growth and profitability
5. More detailed Precision data tagging provides foundation for future waves of AI-driven innovation

**Westlaw Precision** positions us to play a critical role in the transformation of the Legal Profession, driven by increased regulatory complexity and tech adoption.

# Q&A