



# Digital transformation through effective partnership – A success story

McCarthy Tétrault and Thomson Reuters

**Adoption of Thomson Reuters ProView®**

The intelligence, technology and human expertise you need to find trusted answers.



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## The customer

As the first national law firm in Canada, McCarthy Tétrault LLP is also one of the first law firms to develop legal project management, digital information management services, and other cutting-edge legal solutions.

Recently, the firm converted their entire holdings of looseleaf supplemented services into digital looseleaves on the Thomson Reuters ProView® platform. McCarthy Tétrault now benefits from firm-wide remote access to all titles and increased efficiencies across its offices.

## Leadership commitment

From the beginning, Agathe Bujold, Senior Director, Research & Information (Clients & Markets), had the strong backing of leadership that ProView was the most effective solution for McCarthy Tétrault. “Adopting ProView – thus expanding and streamlining access to online resources – was the way to go for our professionals who travel around the globe and need to access legal resources anytime, from anywhere, for clients’ benefit. In addition to realizing economies of scale, it is an incredible competitive advantage.

“Our firm is built on an integrated approach to the practice of law. Consequently, it is important to reflect this in the way we deliver legal information to various practice groups. Telling people, ‘You now have an entire collection of 200 titles at your fingertips,’ is a great way to support our professionals in their practice. My team has been supportive because to us, it was very much in line with our firm’s vision and priorities.”

Sadhana Maharaj, Manager of Research - Research & Information (Clients & Markets), agrees. “ProView is fully aligned with our firm’s goal to innovate service delivery by finding new ways to provide better, more effective and efficient service.”

As national director of R&I, Agathe leads a team of 12 people across the country in research and information management. They all worked together on the ProView launch. “One thing was clear from the start – we wanted to present it as great news, because we strongly believe that this is, indeed, great news as it represents huge efficiency gains for everyone.”

Effective teamwork was aided by a firm culture that embraces change around technology.

All-around support was essential. The R&I team could count on the support of leadership and the opinion of lawyers during the negotiation and implementation phases.

The process began in November 2017. The R&I team’s mandate was not to ask all lawyers if they were okay with removing print from the libraries. It had been determined that it was the way to go during discussions with managing partners, with professional resources, and with the leadership. So, it was more about adopting a different mindset and developing a model that would address all research needs across the board. “Making sure that we would get practitioners’ buy-in and that they would appreciate and value the experience.

“Our goal was to establish a strong partnership with external and internal stakeholders – we wanted to implement an innovative solution for our partners, associates, and students, and everyone who now works from home or from any other place on earth. That was the main rationale behind it, and also how we presented it.”

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**Sadhana Maharaj**

Manager of Research – Research & Information (Clients & Markets)  
McCarthy Tétrault LLP

## From project to partnership

Another key partnership throughout this transformation was with Thomson Reuters, which was integral to the process in every way. “You can’t implement such an important initiative without a strong relationship with the vendor. Or if you do, get ready for pitfalls, problems, and lack of efficiency.”

### OnePass single login to track usage

“We first thought about IP (Internet Protocol) but we wanted to monitor usage in order to assess needs on a regular basis. So very soon in the process, we decided that people would access it through OnePass. That was really important for us. Moreover, we knew that accessing ProView through OnePass would give everyone the opportunity to have access to an integrated suite of products that includes WestlawNext Canada.”

Agathe and her team leaned on Lisa Ziegler, National Sales Manager for Print, Legal and Tax & Accounting, Canada, to ensure seamless implementation, and got the passwords from Tony Moura, Manager, Product Support for Legal and Tax & Accounting, Canada. “Thanks to Lisa, Tony, and their team, the experience was a very positive one. They guided us along the way, provided great advice, and important information about our holdings, among others.”

### Deep links for discovery and seamless linking

Tony Moura also provided the library technicians with 200 deep links the R&I team needed for the online catalogue. Thanks to the technicians’ hard work and to the great collaboration with Tony’s team, users could then access ProView in two places – from WestlawNext Canada and from McCarthy Tétrault’s own catalogue. Deep links ensured early adoption because people were used to searching the catalogue to find their research resources.

## Effective internal communications

The communication plan consisted of two clear and simple announcements. “Not 10, because the more you insist on the fact that it’s a big thing, the more people worry about it. Human nature. We posted it on the intranet and we also sent a communication, so nobody would be taken aback by a sudden and unexpected change. Although we wanted to keep it minimal, our goal was to be as inclusive as possible.”

The first notification about ProView went out in December 2017. Everyone was informed that the firm would start using ProView as of January 2018. “About a month and a half after we had signed the contract, we announced it on our intranet in a very simple way. ‘You will have access to the online version of all Thomson Reuters titles, from anywhere, and in all our offices. If you need training or want to discuss it, please contact us.’ ”

“Our image on the intranet was a computer with a stack of books in the computer. ‘Look at all the titles you have at your fingertips’ was the key message. Everyone got the value immediately, or at least nobody reacted in a negative way to the announcement. We were agreeably surprised and encouraged by the reaction. From a manager’s point of view, I was happy that the team was now spending more of their time on value-added tasks. Managing looseleaf subscriptions involves a significant amount of low-value work for the team (looking for missing books, processing invoices, filing supplements).”

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**Agathe Bujold**

Senior Director – Research & Information (Clients & Markets)  
McCarthy Tétrault LLP



They then offered to arrange Thomson Reuters Webex training sessions to address the concerns of heavy users of print “and we did some ad hoc training on request. We wanted to reassure everyone and hold their hands during the transition. We didn’t hide the fact that the cost of maintaining a print and online collection was steep. We admitted that the new tool would also allow the firm to realize huge savings. In addition, we shared that we had to get prepared – budget-wise – for more artificial intelligence tools and other innovative solutions offered.

“New users were our biggest ambassadors, our champions. They helped us spread the word.

“It was really a quiet launch. However, it was important for us to be open-minded and to welcome questions and concerns.”

### Preparing for the transition

“It’s crucial to take the time. Some people may wish to implement the new tool too soon and skip a few steps. Matthew Peters, National Innovation Leader, was a great project sponsor during the development and implementation phases. He supported this approach and agreed on the timeframe that we suggested. We wanted to be confident that everything was working well before sharing the good news. Preparatory work is as important as the launch. Testing the product, training the core research team, working on training sessions with Thomson Reuters, and making sure everything runs smoothly the day we announce the new tool is key.”

“Dedication and hard work ensured a smooth transition for everyone. The team was proactive, answered questions, and each team member made it a personal goal to integrate the new tool successfully. They also became heavy users very quickly. They provided comments before we implemented the tool firm-wide, which proved to be extremely helpful. Their expertise helped us identify pain points and provide comments to Thomson Reuters on the platform. We have to embrace change and believe in a product before convincing people that the new tool is what they need. It was crucial for everyone in the team to realize the benefits before bringing it to the lawyers’ desktops,” said Agathe.

“We learned how to use it in an efficient way before other users did.... how to print, how to extract a chapter, how to cite the information retrieved. Team feedback helped us tremendously throughout the process. Information professionals are experts in using various databases. If they cannot share honest feedback with team leads, they will not be great ambassadors. We believe in sharing and addressing concerns in an honest and open way.”

### Dealing with change management

There was little resistance and it was never about the decision to adopt ProView.

“That was settled with the leadership from start. This is what we believe is best to do.

“The resistance was more about using the tool itself. ‘It’s not the same, I don’t like it as much, I like to have my book.’ We said, we hear you. Give the new tool a chance, use it, and provide comments. Our team also made it known that Thomson Reuters welcomed comments and constructive feedback.”

The federated search feature in WestlawNext Canada also helped demonstrate the value of ProView, while promoting usage (which was one of McCarthy Tétrault’s goals). “Being able to search ProView eLooseleafs from WestlawNext Canada was a big selling point, to have access to everything under one roof.”

The iPhone app (Android app also available) was another selling point. “Many people asked whether it was available when we were launching ProView.”

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McCarthy Tétrault LLP

## In summary

According to Agathe, the transition to ProView was the smoothest implementation ever for the Research & Information team, and her team has led and facilitated many of those initiatives in the last three to four years.

The partnership with Thomson Reuters – “understanding our needs, and making sure we would do it in the right way” – was key to success.

“Everything went very, very well.”

Implementation took only two months, and ProView usage has been excellent since the launch.

McCarthy Tétrault will continue to monitor usage and gather feedback. “We didn’t want to use statistics too early in the process. But the research team was using it a lot. We had heavy usage a few weeks after the launch. We knew that we were off to a great start.”

Going forward, the R&I team will take a deep dive into which features are used the most, what users would improve, and what enhancements they would like to see.

Time and/or cost savings can already be quantified. On the administrative side, the number of invoices being processed locally and approved nationally dropped from 150 invoices a month to just one – a time savings of 75 hours a month for technicians, R&I managers, and Finance (AP).

Looking back on this transition, the only thing Agathe Bujold might have done differently is to send out the communications about ProView earlier. She doubts it would have had much of an impact because people usually react when they need to use a tool, not when they receive the communication about it. Yet the pressure put on the team was huge. Fortunately, the firm-wide team was well prepared, engaged, and proactive, which was key for the ProView implementation to be a success.

## Thomson Reuters

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## The math is simple



**1 MONTHLY INVOICE,  
DOWN FROM 150**

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75 HOURS/MONTH**

*“The transition to ProView was the smoothest implementation ever for our team.”*

**Agathe Bujold**

Senior Director – Research & Information (Clients & Markets)  
McCarthy Tétrault LLP

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