



# Artificial Intelligence in Defense Practice Seminar

## March 10, 2026

### **PAPER TITLE:** How to Enhance Legal Research and Case Strategy with AI: A Practical Litigation Framework Using Westlaw

**Jay M. Mattappally (Author/Presenter)**

*Irwin Fritchie Urquhart Moore & Daniels LLC*  
400 Poydras Street, Suite 2700  
New Orleans, LA 70130  
[jmattappally@irwinllc.com](mailto:jmattappally@irwinllc.com)

**Ryan Pottebaum (Author/Presenter)**

*Thomson Reuters*  
2900 Ames Crossing Rd, Suite 100  
Minneapolis, MN 55121  
[ryan.pottebaum@thomsonreuters.com](mailto:ryan.pottebaum@thomsonreuters.com)

### **SESSION TITLE:** *How to Enhance Legal Research and Case Strategy with AI: A Practical Litigation Framework Using Westlaw*

Presented by:

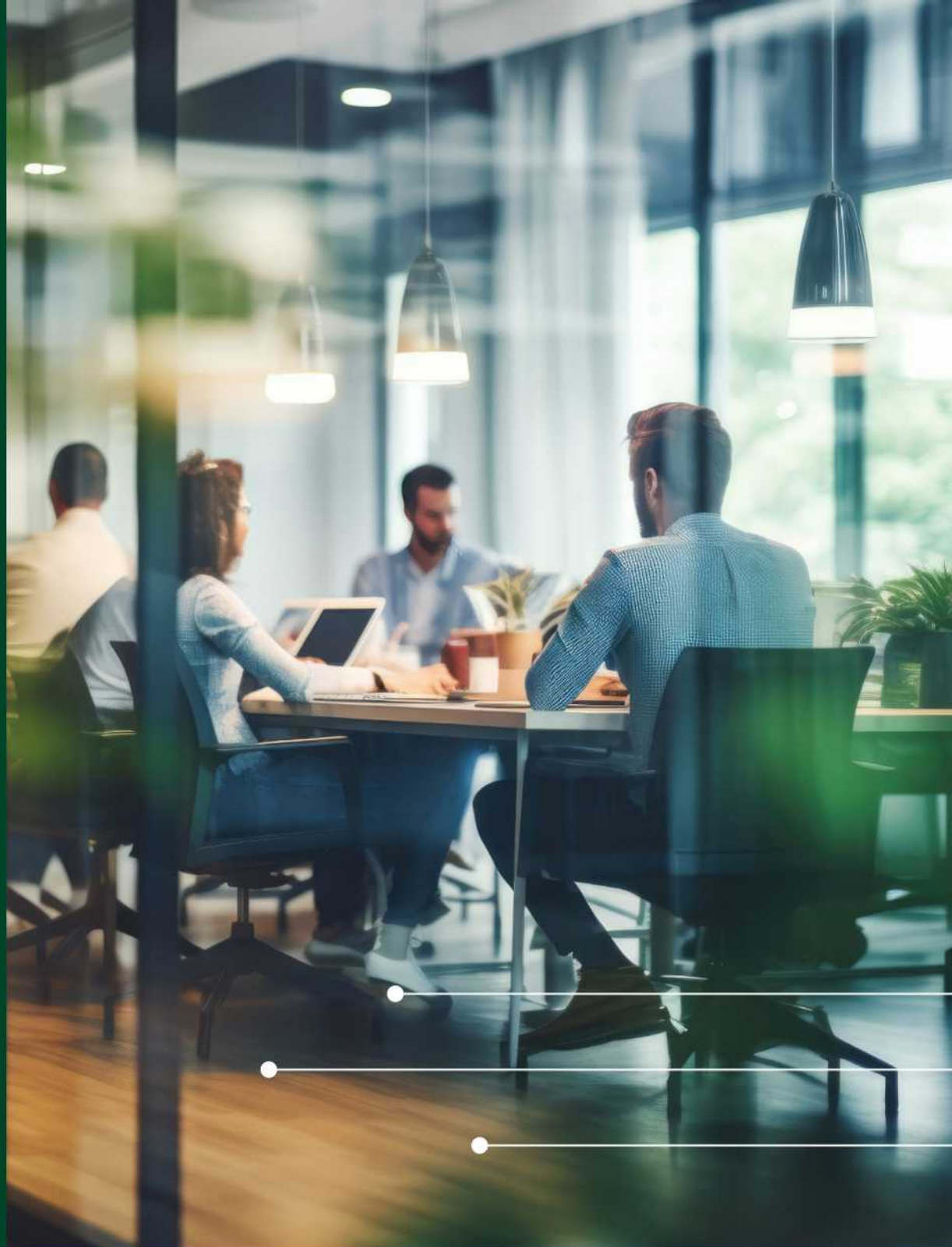
**Jay M. Mattappally**, *Irwin Fritchie Urquhart Moore & Daniels LLC, New Orleans, LA*  
**Ryan Pottebaum**, *Thomson Reuters, Minneapolis, MN*

**Jay M. Mattappally** is a Partner at Irwin Fritchie Urquhart Moore & Daniels, LLC in New Orleans, where he defends manufacturers in individual and mass-tort litigation across the environmental, medical device, pharmaceutical, chemical, and consumer product industries. With experience spanning pre-suit investigation through trial, Jay leads nationwide expert-work-up teams in complex environmental and product-liability matters for a global chemical manufacturer, serves an integral part in the firm's role as national coordinating counsel for an international hip-implant manufacturer, and acts as local and trial counsel in national asbestos and silica litigation. A past recipient of the Defense Research Institute (DRI) Young Lawyers Rookie of the Year award, Jay is involved in several defense organizations, including International Association of Defense Counsel (IADC), Lawyers for Civil Justice (LCJ), and DRI, where Jay is an active member of the DRI Center for Law and Public Policy's Artificial Intelligence (AI) Task Force.

**Ryan Pottebaum** is a Senior Account Executive at Thomson Reuters, where he has spent over a decade helping law firms leverage technology and AI-powered legal solutions to drive efficiency and profitability. Based in Chicago, Ryan specializes in consultative engagements with law firm executives, building strategic partnerships that deliver measurable value through advanced legal technology adoption.

Prior to his career at Thomson Reuters, Ryan practiced as an attorney specializing in criminal defense and personal injury arbitration, giving him firsthand insight into the challenges facing legal practitioners. This unique combination of legal practice experience and legal technology expertise positions him to provide practical, real-world perspectives on how AI-powered research tools can transform legal workflows.

Thomson Reuters®  
CoCounsel Legal  
AI lawyers swear by



# Complete your work with unprecedented speed and precision

Accelerate your legal work with a comprehensive AI solution that helps you complete research, document analysis, and drafting — all in one place.



### Work faster

Complete complex legal tasks with confidence using expert-built agentic workflows.



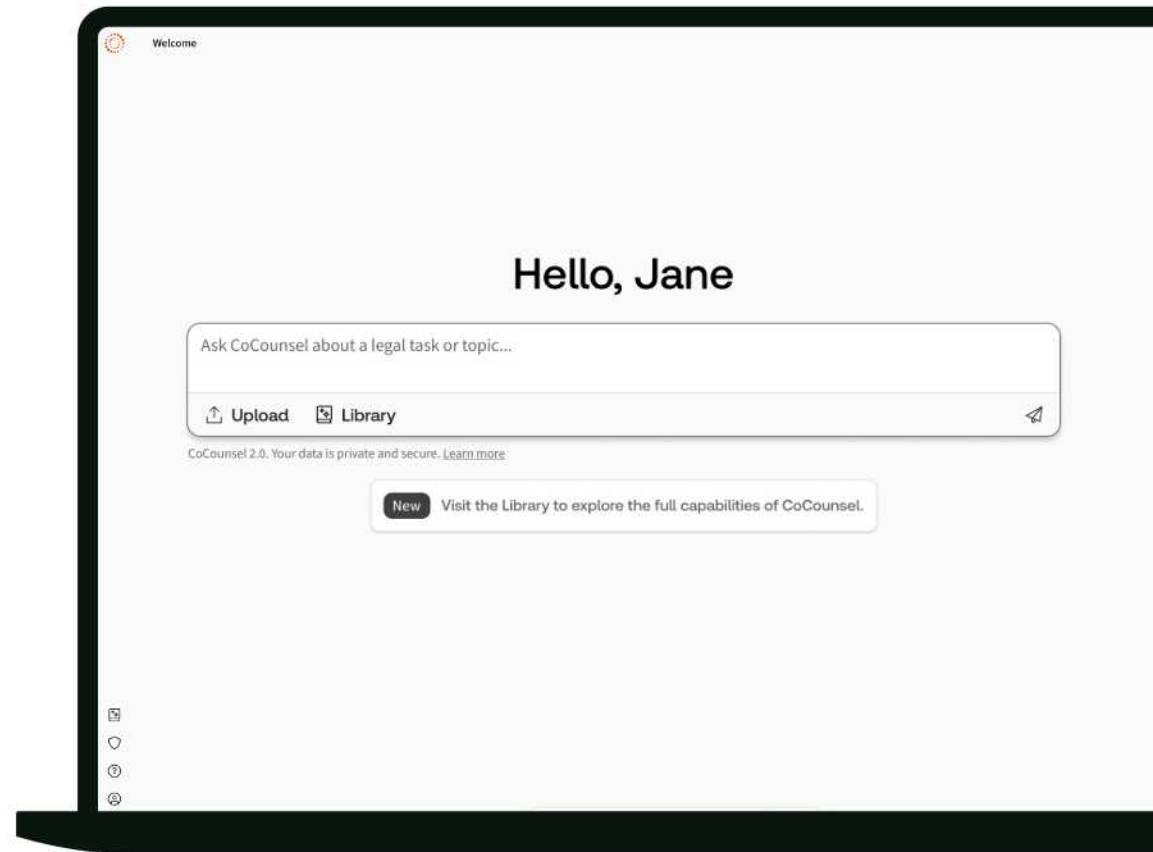
### Work confidently

Get verifiable results grounded in trusted Westlaw® and Practical Law™ content and expertise.

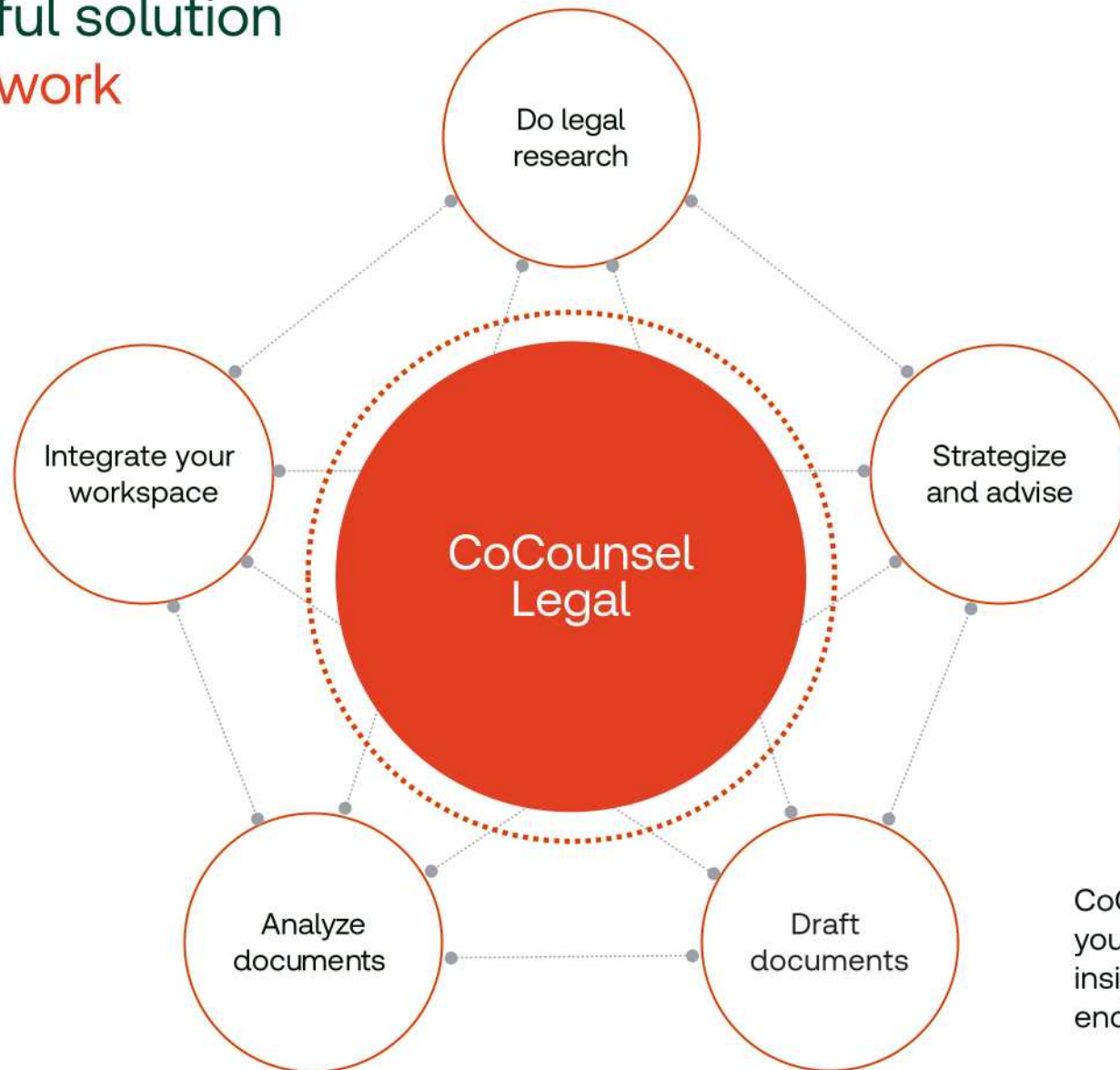


### Work strategically

Uncover nuanced insights that enable you to make sharper, more strategic decisions.



# One powerful solution for all your work



CoCounsel guides you to invaluable insights, through end-to-end workflows



**Do legal research:** Gain unparalleled efficiency with deep research grounded in trusted Westlaw authority



**Strategize and advise:** Get up to speed quickly so you can navigate evolving legal realities, legislative changes, and practice areas



**Document drafting:** Draft, refine, and finalize high-quality legal documents — directly within Microsoft® Word



**Analyze your own documents:** Reduce the time it takes to review documents by as much as 63%\*



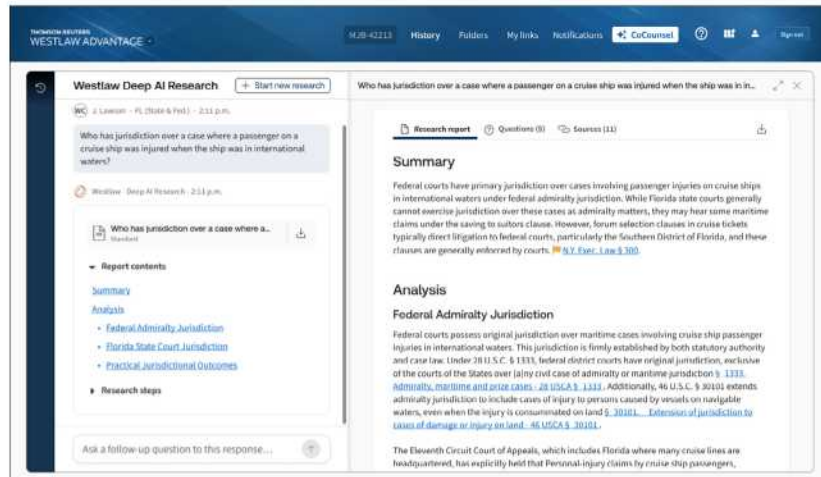
**Integrate your workspace:** Work seamlessly across the tools you use every day — Westlaw, Practical Law, Microsoft 365 and DMS



\* Time savings data from Thomson Reuters customer surveys, 2024

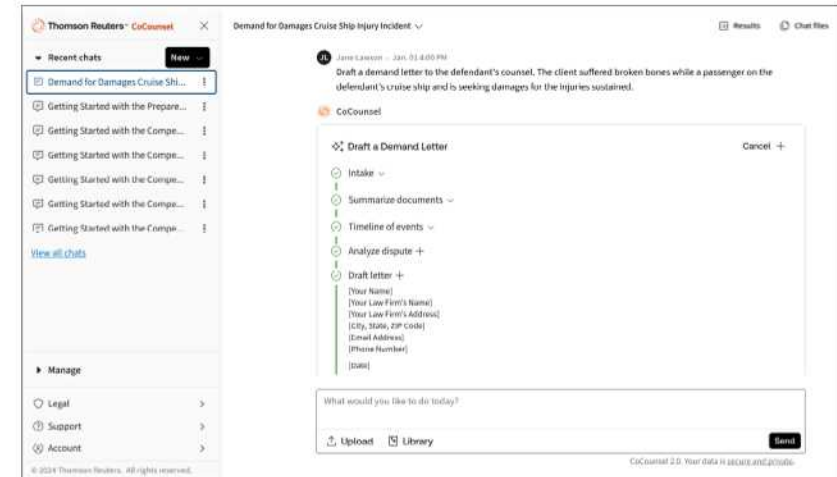
# Achieve unparalleled research efficiency

Get more accurate, thorough, and comprehensive answers to your legal research questions with Deep Research. Ask your question, and Deep Research formulates a multi-step plan using proprietary Westlaw content and tools to complete the research, refining the process as it goes for optimal results.



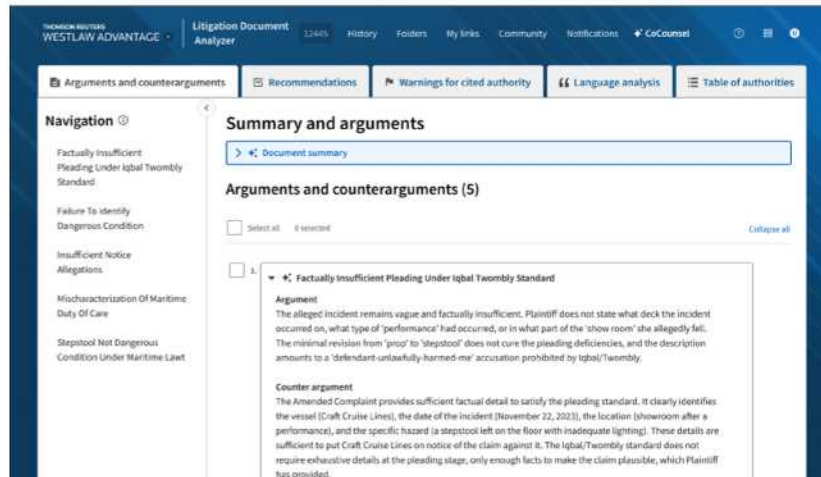
# Transform the way work gets done

Accelerate time-consuming, multi-step work with end-to-end agentic workflows, built by legal experts. Receive suggestions for each project phase and recommended actions carried out upon request to move faster from research to execution.



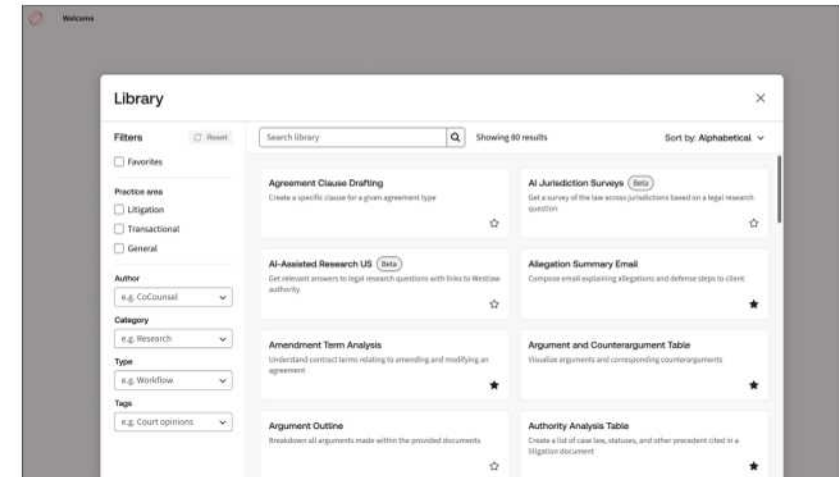
## Gain a strategic advantage

Uncover insights, such as mischaracterizations of the law, hallucinated cases, and arguments for both sides of the matter, within your litigation documents. Litigation Document Analyzer provides in-depth analysis that helps you strengthen your arguments to give you an advantage over opposing counsel.



## Get to work, without the guesswork

Enhance the quality of your results and accelerate AI adoption across your organization with expert-created prompts designed to help you get started faster and work with greater speed and confidence.



# The CoCounsel Difference

## Take back your time

CoCounsel can reduce the time it takes to perform legal work by as much as<sup>1</sup>:

63% for document review



63% for drafting and reviewing contracts



## Transforming the way legal professionals work

20,000+

law firms and legal departments use CoCounsel



80%

of AmLaw 100 adoption



More US courts have CoCounsel than any other AI legal solution:

the entire federal court system — including the Supreme Court, circuit courts, and federal public defenders — has CoCounsel, and courts in 94% of US states have CoCounsel

Powered by

225+

Years of proprietary editorial enhancements

1,000+

GenAI, machine learning, and data professionals

2,500+

Legal, tax, and risk experts

<sup>1</sup> Time savings data from Thomson Reuters customer surveys, 2024

---

## Why CoCounsel Legal?

CoCounsel Legal frees you to focus on the high-value strategy that drives better outcomes and business growth.

Visit [tr.com/cocounsel-legal](https://tr.com/cocounsel-legal) to learn more.





# Westlaw Advantage

Research your way. Trust the results.

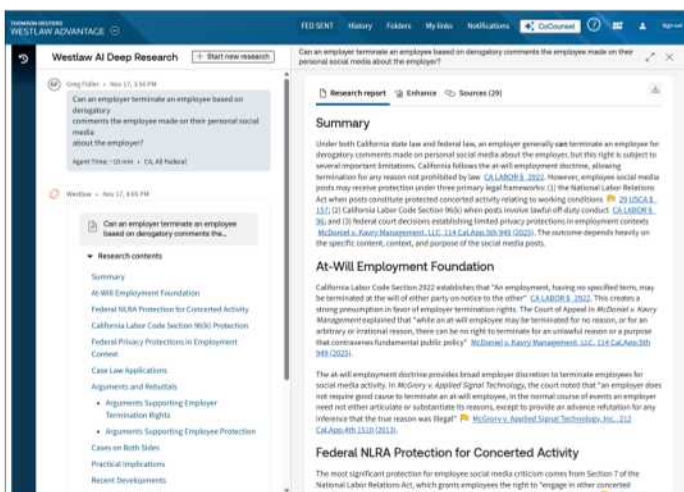
Legal research is nuanced, time-consuming, and questions always remain. The combination of increasing complexity, overwhelming manual tasks, and escalating stakes demands faster, more precise, and more strategic legal research. With Thomson Reuters® Westlaw Advantage, you can quickly go from research to strategy, confident your results are as thorough and accurate as possible. By applying the power of advanced AI to trusted industry-leading content, Westlaw Advantage activates and employs its entire set of capabilities for you, revolutionizing the way you conduct research.



# Deep Research

## Move from research to results faster and smarter

Deep Research integrates advanced AI to deliver expert-level legal research that surfaces key precedents and unique insights, creating a comprehensive, multi-step report using proprietary Westlaw content and tools. With real-time refinement, you can get thorough insights and actionable answers for confident decision-making.



## Streamline complex research

### Expert AI-powered research

Deep Research's agentic AI rapidly analyzes vast legal content, identifying and presenting the most relevant key precedents and unique insights, including cases on both sides and opposing arguments.

### Transparent and interactive insights

Gain real-time understanding of how results are generated, with detailed, step-by-step research notes providing clarity and fostering trust in the research process.

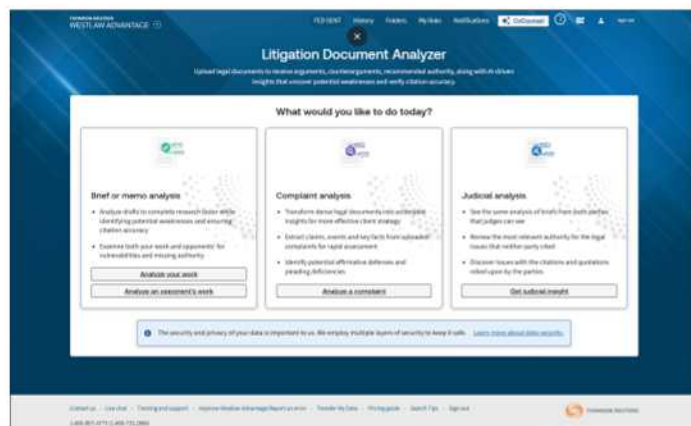
### More tailored analysis

Deep Research's 'Enhance' feature guides you with intelligent questions to uncover pivotal facts, then generates an elevated report with more customized legal guidance.

# Litigation Document Analyzer

## Gain a strategic advantage

Uncover hidden insights within your litigation documents, such as mischaracterizations of the law, potential hallucinated cases, and arguments on both sides of the matter. Litigation Document Analyzer provides in-depth document analysis that helps you build a strong foundation for your arguments and gives you insights that can give you an advantage over opposing counsel.



## Detailed analysis you can trust

### Comprehensive mischaracterization detection

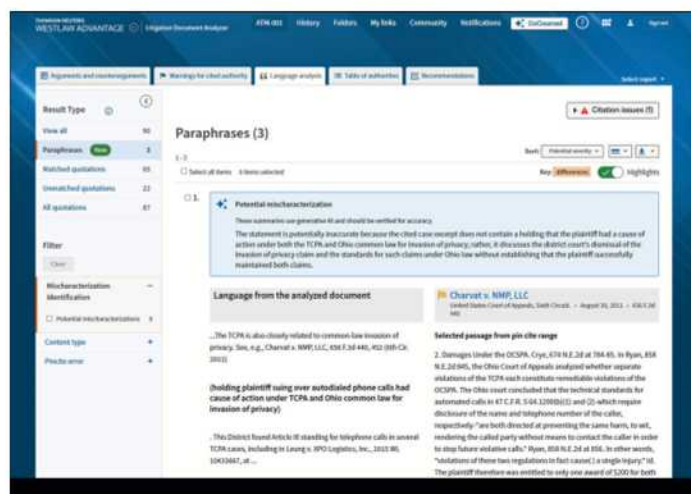
Move beyond analyzing quotes to also identifying potential misrepresentations of law throughout an entire brief, empowering you to respond with precision.

### Strategic argument analysis

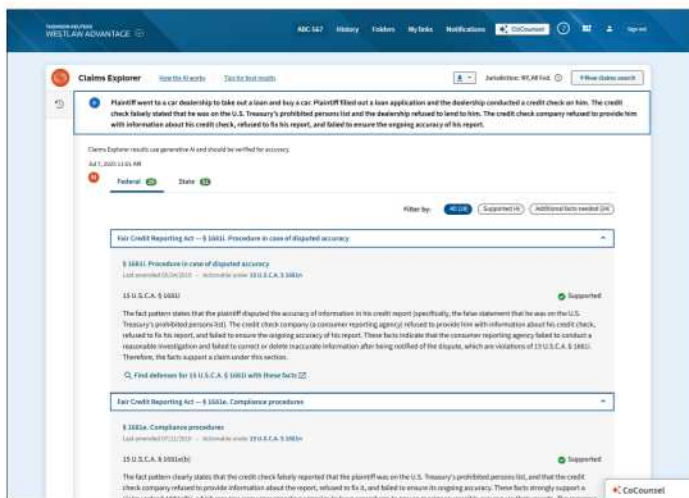
Get a clear overview of opposing arguments and additional supporting arguments, complete with supporting legal authority, helping you anticipate challenges and build your strongest brief.

### Quick understanding of complaints

Transform complex complaints into concise, easy-to-understand summaries that highlight critical information, accelerating your case assessment.



# Get unparalleled efficiency with advanced AI

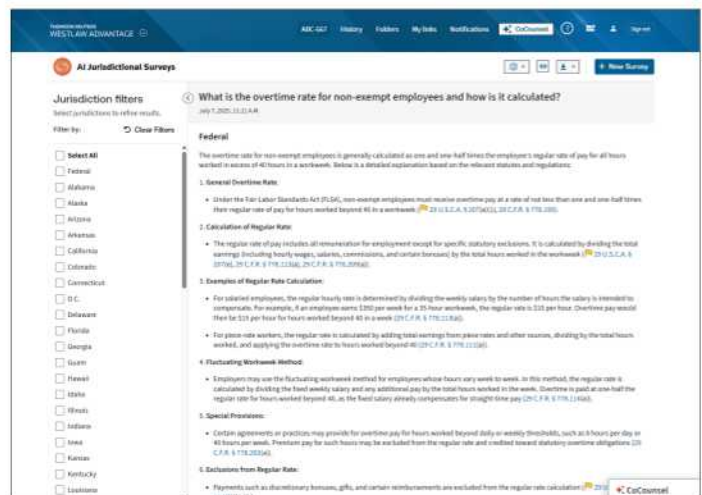


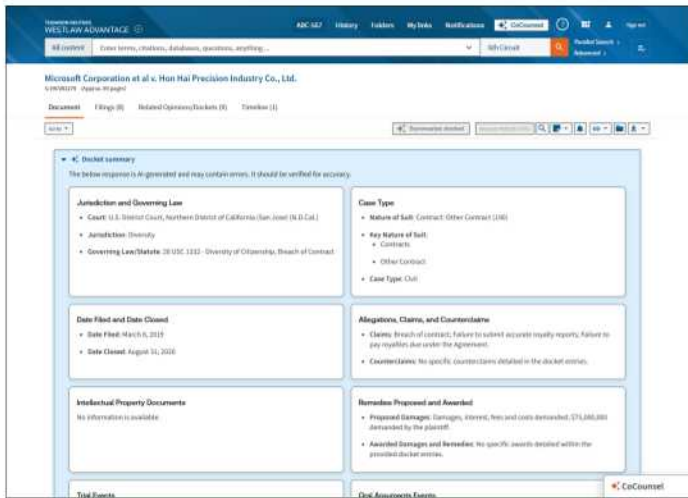
## Claims Explorer

Quickly uncover the strongest and most relevant claims and defenses for your case with Claims Explorer. Simplify your research and gain confidence knowing you haven't missed critical claims that could impact your complaint or case outcome.

## AI Jurisdictional Surveys

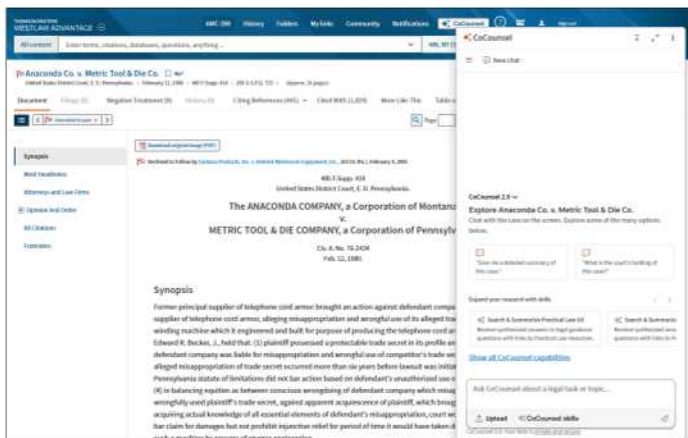
Streamline the process of creating comprehensive and up-to-date surveys of the law. Craft your survey with a search query, and in minutes, have a solid starting point in every jurisdiction you need to research. Get the most up-to-date law in each jurisdiction and be put on notice of changes in the law with KeyCite® flags.





### Additional AI capabilities

Quickly distill large or complex data using advanced AI to surface what’s most relevant and actionable. From navigating complex legal content to identifying key insights across sources, AI helps streamline your research so you can reach confident conclusions faster.

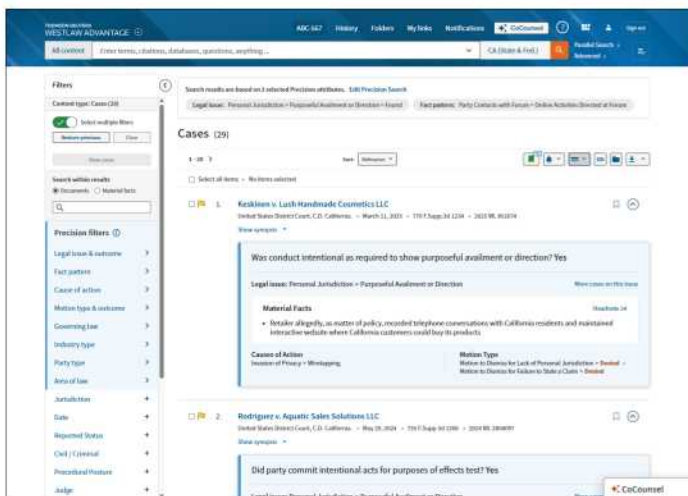


### Thomson Reuters CoCounsel

Thomson Reuters CoCounsel is the industry-leading AI legal assistant, designed to transform complex legal work and deliver insights previously unattainable. It’s powered by AI grounded in the authoritative content and expertise of Thomson Reuters Westlaw and Practical Law. Use CoCounsel chat to ask questions, request analysis, and receive guidance that leverages advanced AI capabilities across your daily solutions — including Westlaw Advantage, Practical Law Dynamic Tool Set, and Microsoft® 365 products. This empowers you to accelerate your workflow and gain superior insights through intuitive conversation.

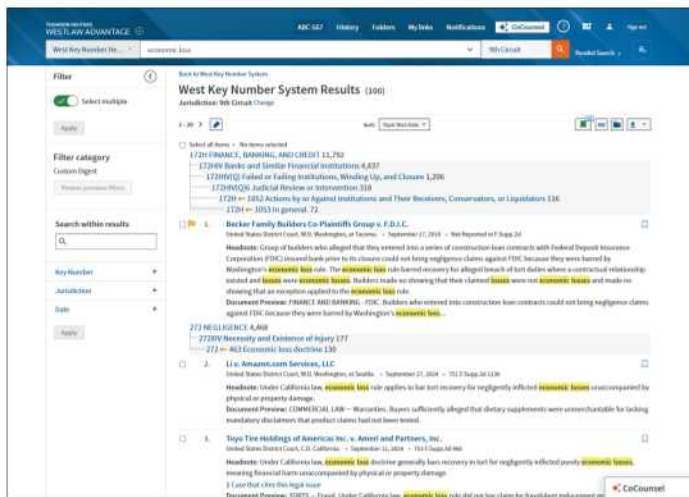
# Westlaw: The standard for legal research

The power of Westlaw exists for one reason: To empower legal professionals with more accurate and effective research capabilities. With Westlaw, you gain access to trusted content and editorial enhancements that enable you to work smarter, faster, and with total confidence.



## Advanced tools included in Westlaw Advantage

- Precision Research:** Use Precision Filters to drill down to cases that have a particular legal issue, fact pattern, cause of action, motion type, governing law, industry type, party type, and/or area of law.
- Litigation Analytics:** Build the strongest case strategy and manage client expectations with insights on judges, courts, damages, attorneys, law firms, and case types.
- KeyCite Cited With:** View cases that are frequently cited together, even if neither cites the other making it easier to find connections between cases and identify changes in how the law has developed.
- KeyCite Overruled in Part:** Easily identify the specific part of a case that has been invalidated so that other valid points of law aren't overlooked.
- KeyCite Overruling Risk:** Know when a point of law in your case has been implicitly undermined based on its reliance on an overruled or otherwise invalid prior decision.



## Content, editorial enhancements, and more

- Secondary sources:** Get up to speed in new areas of the law or revisit familiar ones with the largest selection of leading national analytical titles.
- Litigation materials:** Access the most comprehensive online collection of litigation materials including pleadings, motions, and memoranda for all 50 states, state and federal appellate briefs, trial court orders, expert testimony, and much more.
- Key Number System:** The most comprehensive classification system of U.S. law — use it to quickly find other cases that address your exact point of law in any jurisdiction.
- Headnotes:** Concise summaries of the points of law discussed in a case, making it easier to review the key issues of an opinion.
- KeyCite:** Use KeyCite to instantly verify whether a case, statute, regulation, or administrative decision is still good law.
- Annotations and indexes:** Our comprehensive collection of state and federal annotated statutes and the industry's most comprehensive annotated CFR make the law easier to find and interpret.

---

## Experience Westlaw Advantage

To learn more, visit  
[tr.com/westlaw-advantage](https://tr.com/westlaw-advantage)



## Westlaw Advantage Gen AI Capabilities

- **AI Deep Research** – use Agentic AI to rapidly analyze vast amount of legal content, surface key precedents, and deliver clear, transparent insights – all in a fraction of the time traditional research requires.
- **Litigation Document Analyzer** – Review entire documents to spot for inaccurate citation and broader misstatements of law. It automatically reviews opposing arguments, suggests counterarguments with supporting authority and summarizes complex complaints into clear actional insights.
- **Claims Explorer** – Simply enter the facts of your case and Claims Explorer will generate a list of relevant claims for you to consider, which includes an explanation to help you understand why it was surfaced and whether it is worth research further.
- **Parallel Search** - A new way of searching that helps you quickly find cases that contain conceptually similar sentences to your query.
- **CoCounsel Chat** – CoCounsel Chat in Westlaw provides the ability to summarize cases and offer prompts for deeper analysis across Westlaw content.
- **Summarize Keycite Negative Treatment** – Quick grasp why a case has negative treatment with GenAI
- **Docket Summaries** – Quickly grasp the key points and outcomes of a case without sifting through the entire docket.
- **Smart Browse for Cases and Statutes** - Smart Browse for Cases intelligently browses case law, while Smart Browse for Statutes optimizes the way users interact with and view complex statutory text and legislative materials. Both features employ context-aware technology that analyzes the user's intent, filters out extraneous information, and surfaces only the pertinent content needed for the task at hand - whether preparing for litigation, conducting legal research, or managing transactional matters.
- **Know Your Judge** - Know Your Judge is an AI-powered feature within Litigation Analytics that uses a Large Language Model to analyze individual judges' past rulings, fact patterns, and cited precedents. The tool generates concise summaries of a judge's decision-making tendencies and judicial philosophy, eliminating the need for manual review of extensive case histories.