



# In-House Counsel Strategies: Optimizing Legal Research Tools for Cost Control



Running a legal department can feel like a high-wire act at the best of times, but when you're operating in the most highly regulated state with the most extensive court system in the country, external support is often critical. However, as the role of in-house counsel evolves in response to ballooning workloads and constrained budgets, legal departments in California are increasingly expected to do more with less.

Before you click "send" on that email to outside counsel and deplete your legal budget, there is one step you can take to ensure you're optimizing your resources. Used strategically, legal research tools can maximize your ability to operate independently and efficiently so you can engage external counsel for the specialized matters where their expertise is most crucial.

Here are seven practical tips for leveraging legal research to inform your decision-making, ground your strategies in robust data and minimize unnecessary expenses.

## Initial legal analysis

In-house counsel is the first port of call for legal queries requiring prompt and accurate answers. While outside counsel can offer specialized insights and support on niche issues, legal research tools can help with initial assessments by quickly orienting you on relevant case law, statutes and legal precedents.

[CEB's Practice Guides](#) and [Secondary Sources](#) provide detailed explainers, instructions and analysis for handling legal matters across various practice areas, including business, employment, family, personal injury and real estate law. Need to dig a little deeper? Look no further than the robust [county guidance](#) included with CEB's tools.

These resources can provide an up-to-date primer on the issues you'll be dealing with. Taking this step before or instead of consulting external counsel will allow you to reserve their time for the meatier issues requiring their attention.



## Drafting legal documents

Keeping the drafting of legal memos, contracts and other documents in-house can make your costs more predictable and position you to respond quickly to urgent needs. Leveraging sample templates and forms from legal research platforms saves time by building upon ready-made, uniform documentation.

For example, CEB's [attorney-drafted forms](#) help you ensure you aren't missing any vital language, clauses or best practices by providing accurate and reliable information written by active California attorneys.

## Monitoring regulatory changes

When it comes to rapidly evolving laws and regulations, there's no place like California, which has the most stringent industry rules and a court system bigger than that of most countries. This makes staying informed a mammoth task, requiring a systematic approach intertwined with daily operations. The centralized repository of up-to-date information that legal research tools provide can be indispensable for staying current as laws and regulations change.

Many in-house legal departments outsource monitoring legal updates to their outside firms. While any external counsel should apply current knowledge to their work for a company, in-house lawyers also have a duty in this regard. For one thing, it provides a second opinion on the recommendations of outside counsel. For another, there's no need for a company to pay an outside lawyer for updates on more routine laws and regulations that affect the day-to-day operations of the business. That's appropriately in the corporate counsel's wheelhouse.

CEB's [Practice Guides](#) are curated by an expert community of contributing judges and lawyers who frame, organize and monitor updates on legal issues. The content is specific to California and ranges from consumer protection laws to industry-specific guidelines. By keeping an internal pulse on regulatory changes, you can proactively address compliance issues as they arise rather than waiting for outside counsel to provide updates on the laws and regulations impacting your business.



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## Conducting compliance audits

Regular compliance audits are crucial for maintaining organizational integrity and managing risk — and not every aspect has to be handled by outside counsel. Legal research tools can support internal audits to ensure compliance with the California laws and regulations applicable to your company.

Leverage compliance checklists for issues such as [termination processes](#), [disability accommodation](#) and [fiduciary duties of LLC managers and members](#) to identify areas of risk, establish necessary policies and procedures and support informed decision-making. Making this a regular practice can foster a culture of compliance that supports long-term organizational success, reducing the need for intervention from outside counsel.



## Issue-spotting during transactions

Thorough due diligence during mergers, acquisitions and other corporate transactions is essential for uncovering the issues that could affect the deal's success or expose your organization to unforeseen liabilities post-transaction. By leveraging legal research platforms with vast databases and advanced search capabilities, you can issue-spot in tandem with external counsel to ensure all bases are covered and give sound advice to key decision-makers.

CEB's [primary law database](#) supports a detailed review of potential risks and compliance issues with comprehensive access to case law, statutes, regulations and transactional documents, allowing for detailed research and analysis.



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## Preparing for litigation

Legal research tools are invaluable for preserving relevant information when litigation is anticipated, developing effective strategies once litigation is underway and determining whether a matter is complex enough to warrant outside counsel. With their access to case law, statutes and regulations, research platforms can facilitate the drafting of briefs and motions, assist in managing discovery by organizing evidence and documents, enabling targeted searches and settlement strategy development.

As CEB was designed for California attorneys, it includes intricate, hyper-local analysis of [statutes](#), [court rules](#) and [case law](#). CEB's [TrueCite](#)® citator uses color codes to flag whether a case has a negative history, how frequently it's cited and which subsequent decision is responsible for the most critical treatment. A team of California attorneys also regularly reviews the information provided by TrueCite to capture nuances and ensure accuracy and reliability.



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## On-demand MCLE courses

While conferences are a great way to keep up with the compliance issues and regulatory requirements affecting your company, busy in-house counsel rarely has the bandwidth to attend all the events they'd like to. Legal research platforms are a valuable source for plugging this gap with up-to-date information and supporting materials.



Take advantage of [webinars](#), [MCLE programs](#), and other [training materials](#) to stay ahead of emerging issues and best practices. CEB's modules cover more than 25 practice areas, including employment, privacy, tax and bankruptcy law.

## Monitoring the issues affecting your business

Anticipating the trends that will impact your business before they translate into new laws and regulations can give you a strategic advantage. By monitoring legal news publications, industry reports and regulatory updates, you can stay ahead of potential changes and prepare your business accordingly.

CEB's [DailyNews](#) section is useful for staying informed on the latest updates across more than 30 practice areas, with takeaways and practical insights for attorneys. The articles, written by attorneys, range from deep dives into hot-button California legal issues to roundups of new laws, regulatory changes and litigation outcomes. CEB's ongoing articles also explore urgent and important topics, such as [the impact of climate change](#) across practice groups and what California-based lawyers need to know. All DailyNews stories have links to applicable CEB resources for additional information, interpretations authored by leading legal authorities and case law.



## Legal research as a resource management tool

Legal research platforms will never replace the role of outside counsel, nor should we want them to! External support is key for managing high-stakes legal matters that require deep expertise. But operating legal departments with increasingly constrained budgets — in the nation's most highly regulated state, no less — requires a strategic approach to resource management. If you're paying premium rates for outside counsel to pick the low-hanging fruit, your department isn't optimizing its resources effectively.

By making up-to-date information, trusted opinions and practical resources an integral part of your daily operations, you can bolster your decision-making and address routine legal queries with greater efficiency. That leaves more time and precious budget for your outside counsel to assist with the most critical and specialized matters.



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