

2026 EBOOK

From Case Facts to Courtroom-Ready: How AI Is Closing the Gap in PI Law

What happens when the AI platform built for plaintiff firms integrates with the world's most trusted legal research? Attorneys win faster, with more confidence, from intake to verdict.

8 in 10

PI firms have engaged with AI in
some form¹

73%

of plaintiff professionals are
optimistic or excited about AI¹

99%

won't use AI output they cannot
verify¹

A joint thought leadership publication from Supio and Thomson Reuters · Based on a live fireside chat with Bob Simon, Andrew Kim & Liz Zimick · May 2026

¹ Supio, State of AI in Plaintiff Law 2026 (Thirdside Research, March 2026)



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INTRODUCTION

The Race Is No Longer About Whether to Adopt AI

For years, legal technology sold a promise: AI would transform the way law firms work. That promise has arrived — and the race has shifted.

Today, 8 in 10 PI firms have engaged with AI in some form, and 73% of plaintiff legal professionals are optimistic or excited about its role in their practice. The question is no longer **if**, but **which integrations** will separate high-performing firms from the rest.

For plaintiff attorneys facing private equity-backed defense firms with deep resources and aggressive automation strategies, purpose-built AI isn't a competitive luxury. It's how you level the playing field — and increasingly, how you win.

In May 2026, trial attorney and PI law influencer Bob Simon sat down with Supio VP of Partnerships Andrew Kim and Thomson Reuters General Manager Legal Professionals Liz Zimick for a live fireside chat. What followed was one of the most candid conversations in legal AI about what's actually working, what's still broken, and what the Supio-Thomson Reuters Westlaw Advantage integration means for PI firms right now.

This eBook distills the key insights, data moments, and actionable takeaways from that conversation — for every PI attorney who wants to compete, and win.

WHAT YOU'LL LEARN

- 1 Why AI adoption has **crossed the mainstream threshold** — and what that means for firms still on the fence
- 2 How **"fiduciary-grade AI"** changes what legal professionals should expect from their tools
- 3 What the **Supio-Westlaw Advantage integration** actually delivers in a real workflow
- 4 How **agentic AI** differs from **conversational AI** — and why it matters
- 5 A step-by-step **adoption playbook** from attorneys and executives who've done it

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CHAPTER ONE

The AI Adoption Tipping Point — and Why Pretenders Are Fading

Bob Simon started his firm as a true solo in 2009 — scanning his own mail, writing his own briefs, doing everything himself. Today, his firm runs a large litigation and trial practice with one of the most sophisticated AI stacks in plaintiff law. He's watched the industry's relationship with technology shift through several eras. But nothing compares to what's happening now.

"This is the heaviest adoption of AI I've seen," Simon observed. "In the past couple of years, people are actually saying, okay, I need to do this and learn it." What's notable isn't just that more firms are experimenting with AI — it's **who** is adopting it. Trial lawyers at Simon's own firm, historically the hardest group to get onto any new system, are now leading adoption. Why? Because the tools have finally caught up to the demands of litigation.

But alongside genuine innovation, a parallel trend has emerged: an explosion of AI products that lack substance. Simon is blunt about it. "We've had a lot of pretenders out there creating products and pop-ups, and that's been very distracting." Thomson Reuters' Liz Zimick agrees — and the volume of vendor pitches both leaders field daily underscores the signal-to-noise problem every PI firm faces when evaluating tools.

The firms winning today aren't chasing every new AI launch. They're making deliberate decisions about which platforms earn access to their workflows — and they're asking harder questions about compliance, data security, and long-term fit.

8 in 10

PI firms have engaged with AI in some form — yet only 30% use it regularly

SUPIO · STATE OF AI IN PLAINTIFF LAW 2026

73%

of plaintiff legal professionals are optimistic or excited about AI's role in their practice

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"The trial lawyers at our firm adopted AI at a rapid pace. They're usually the hardest to get onto new systems — but those are the ones that benefit the most, because so much happens in the background when they're not there."

Bob Simon · Trial Attorney, Simon Law Group

- **Bob Simon's 3-Question AI Vendor Litmus Test**

Before any new AI tool gets serious consideration:

- 1 **Are you SOC 2 or HIPAA compliant?** Client data protection is non-negotiable.
- 2 **Do you have a simple, open API** that integrates with existing systems?
- 3 **What data are you built on** — and how sophisticated is the underlying product?

Answering "no" or "we're working on it" to any of these is a hard stop.

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CHAPTER TWO

Fiduciary-Grade AI — A Standard, Not a Feature

Speed is no longer a meaningful differentiator for AI. Every platform claims it. What separates the tools that belong in legal workflows from those that don't is a harder bar: **trustworthiness**. This is the concept at the center of Thomson Reuters' approach — what Liz Zimick calls "fiduciary-grade AI."

"Fiduciary-grade AI is not a feature set," Zimick explained. "It's a standard. If AI is going to be used in professional workflows, it has to earn trust the same way a human would."

That means the output isn't just fast, or impressive-looking. It's grounded, transparent, and defensible. The distinction matters because the legal profession operates under obligations that most AI products were never designed to support. When an attorney signs their name to a document, they're staking their license on it. The tools they use need to earn that level of accountability.

What "Grounded, Transparent, and Defensible" Looks Like in Practice

With Westlaw Advantage's Deep Research embedded in the Supio workflow, attorneys aren't asked to trust the AI — they're given a direct line to the underlying legal authority in the moment the work is being created. Instead of generating first and verifying later, the workflow is built on valid law from the start. Westlaw's authoritative content grounds every output in traceable, citable sources.

- **SOC 2 Type II Certified**

- **HIPAA-Compliant**

- **Westlaw Authority**

- **Source-Level Traceability**

Bob Simon extends this thinking to a practical test he runs on every AI tool he evaluates: he inputs a case he already knows — one that's resolved, where he knows every medical record and every outcome. Then he asks the tool questions. "It doesn't have to be perfect the first time," he said, "but does it learn?" Tools that hallucinate, fabricate citations, or fail to adapt to firm-specific context don't make the cut. For high-stakes plaintiff work, the floor isn't interesting AI. It's reliable AI.

"Legal research hasn't been reduced by AI — it's raised the standard for it. Speed without accuracy means you're compounding errors faster. That's the shift: legal research must now be authoritative, verifiable, and usable in the moment the work is being created."

Liz Zimick · GM of Legal Professionals, Thomson Reuters

DIMENSION	GENERIC AI TOOL	FIDUCIARY-GRADE AI (SUPIO + WESTLAW)
Legal Research	Generates output, attorney verifies separately	Westlaw authority embedded inline — validated by the attorney as work is created
Hallucination Risk	High; attorney must catch errors	Grounded in authoritative Westlaw content — easy to validate
Workflow Integration	Layer on top; attorney switches tools to verify	Single workflow; no context-switching required
Data Security & Privacy	Varies; often no legal-grade compliance; may train AI models on user data	SOC 2 Type II, HIPAA-compliant, PI firm-specific data controls; user data is never used for AI training
Accountability	AI generates; attorney shoulders all liability	AI acts on validated law; attorney reviews, not reconstructs

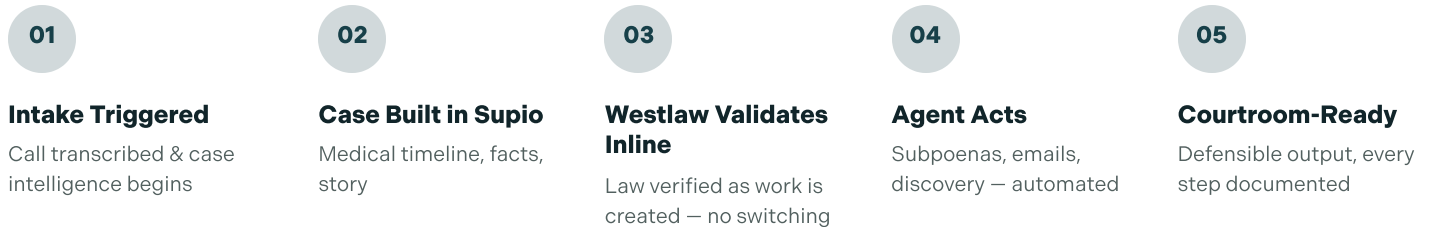
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CHAPTER THREE

The Supio–Westlaw Advantage Integration —
One Workflow, From Intake to Verdict

The holy grail of legal tech has always been a single login — one intelligent system where the moment a case walks in the door, intelligence starts working. The Supio–Westlaw Advantage integration is the first in PI law to make that vision real. And the people who helped build it are explicit about why it was designed the way it was.

"This wasn't just a commercial partnership," Zimick said. "It was a product design decision built around how PI attorneys actually work." Today, without this integration, the reality for most firms looks like this: case facts built in one system, drafting in another, legal validation at the end — if it happens at all. Mistakes creep in. Context gets lost. The attorney carries the gap.



With the integration, Westlaw's research reports are present in the Supio interface as the case is being built — helping attorneys validate the law in the moment the work is being created. Attorneys aren't switching tools, copying work over, or hoping it all comes together later. The research is plugged in, integrated, step by step, into one unbroken workflow.

Bob Simon, who uses both platforms in his own practice, describes the intelligence model this way: "Thomson Reuters is like your brain. It knows the law. Supio is your acting agent — the partner that goes and does the work across all your systems." CoCounsel Legal, Thomson Reuters' comprehensive AI solution for research, analysis, and drafting, provides the institutional knowledge, trusted research, and legal writing. Supio acts as the workflow layer — accessing your Outlook, your case management system, your Westlaw subscription, and acting on your behalf.

"Imagine working on a case in Supio, and something from Westlaw flags that a new ruling might change your legal position. Someone's watching your mail, watching the law, and telling you the next step. That's the intelligence you're going to have."

Bob Simon · Trial Attorney, Simon Law Group

04 CHAPTER FOUR

Agentic AI — When the System Stops Answering and Starts Acting

For the past few years, AI in legal has been conversational: you ask, it answers. That model has proven real value. But it's also created an invisible ceiling — the attorney still carries the work of acting on every answer, switching contexts, and making every decision. Agentic AI changes the model entirely.

"Agentic AI completely changes the game," Zimick explained, "because it's not responding — it's actually doing the work on your behalf." The word "agent," Simon notes, is instructive: an agent means to act. It doesn't wait to be asked. It monitors what's happening across your systems, identifies what needs to happen next, and does it — or prompts you when it can't.

Simon previewed Supio's agentic capabilities to a room of law firm owners — many of whom weren't Supio users at the time. His reaction captures what the category-shift actually feels like: "We've been waiting for this. Every lawyer asks the same question: can I have a single login to manage my entire workflow from one place — not just cases, but the whole firm?"

What that looks like in practice: financial analysis across the firm, case updates at a high level, intelligent email triage ("which ones need my attention?"), subpoena drafting, discovery preparation — all happening in the background while the attorney is with a client, in court, or at their kids' basketball game. The Supio Agent doesn't just automate tasks. It learns your workflows, your judgment patterns, and acts on your behalf within the systems you already use.

"For the first time," Simon said, "lawyers have the ability to replicate and scale the intellectual property of their own brain through an agent." The implications are significant — not just for efficiency, but for firm growth, knowledge retention, and competitive positioning against well-resourced defense operations.

YESTERDAY

Conversational AI

Answers questions. Requires the attorney to act on every output. High value; creates a ceiling.

NOW

Agentic AI

Does the work. Moves across systems on your behalf. Monitors, flags, drafts, and executes. Removes the ceiling.

The Supio Agent can access your Outlook, CMS, Westlaw, Box, and more — and take action across all of them from a single prompt.

"We will be managers — not of a ton of employees, but of a lot of agents. And our people will spend more time with clients, collecting the data we really need to win cases."

Bob Simon · Trial Attorney, Simon Law Group

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CHAPTER FIVE

The Adoption Playbook — What Actually Works

Knowing which AI tools to use is one thing. Getting your firm to actually use them is another. Both Simon and Zimick have watched too many technology investments stall at the implementation stage — and both have developed strong views on what separates firms that successfully adopt AI from those that don't.

01 Pick the right partner, not just the right product

Zimick is direct: "You need to pick a partner who is willing to invest time back into your firm." The vendor relationship matters as much as the technology. Are they willing to come on-site? Do they have a 30-60-90 day onboarding plan? Will they stay invested in your success?

02 Require executive sponsorship

Top-down mandate is a "huge differentiator," in Zimick's experience. When leadership commits publicly to AI adoption, the organizational inertia that kills most technology rollouts dissolves. Change management without executive sponsorship rarely crosses the finish line.

03 Train on your systems, not in the abstract

Simon's recommendation: bring your laptop, pre-connect your systems, and do the work in person. "It has to be on your systems," he said. Theoretical understanding of AI capabilities is far less sticky than hands-on experience with your own case data.

04 Expect a strange learning curve — then momentum

Zimick describes the adoption pattern she's seen across dozens of mid-sized firms: AI feels foreign and hard to conceptualize — until suddenly it doesn't. "All of a sudden you're in it, and you're like, oh my god, I need this open 24/7." The inflection point comes faster than most expect.

05 This summer is the window

Multiple industry leaders are launching major product updates this summer. Simon's call to action is clear: "It's mission critical that everybody gets up to speed." The gap between firms that adopt now and those that wait is widening by the quarter.

30/60/90

Day onboarding plan — map it with your AI partner before you start

BEST PRACTICE · LIZ ZIMICK,
THOMSON REUTERS

1 day/wk

Dedicate one day per week this summer to learning and implementing AI in your firm

BOB SIMON, SIMON LAW GROUP

12 mo.

The window — Bob Simon's timeline for when the competitive gap becomes irreversible

BOB SIMON, SIMON LAW GROUP

"Lean on us. Let Supio and Thomson Reuters help you through that process. We are seeing it everywhere. If you want to make a huge swing — we can get you there really, really fast."

Liz Zimick · GM & CEO of Legal Professionals, Thomson Reuters

• The Urgency Signal

Simon's assessment of firms that don't adopt: "I think it'll be an extinction event." That's a provocative framing — and an intentional one. "For people that have done it and adopted it, it literally can change your life by making you more efficient." The flip side: **"AI is not here to replace you, but it will replace those who don't use it."** And the firms that waited are learning this faster than they expected.

CONCLUSION

The Gap Is Opening. The Playbook Is Here.

AI adoption in PI law has crossed the mainstream threshold. Fiduciary-grade AI has defined what the bar should be. Agentic AI has changed what the tools can do. And the Supio–Westlaw integration has made "one workflow from intake to verdict" a reality — not a promise. The firms moving now aren't just getting more efficient. They're building a structural advantage that will be nearly impossible to close in 12 months.

[Book a Supio Demo →](#)[Explore Westlaw](#)

ABOUT

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Supio

Supio is the leading AI platform for personal injury law firms — Superior AI for PI Law. Supio automates medical record review, drafts demands and litigation documents, and scales firm operations from intake through verdict. With SOC 2 Type II certification, deep integrations across leading legal platforms, and a purpose-built agentic workflow engine, Supio helps plaintiff firms win bigger, faster, and smarter.

supio.com · [request-a-demo](#)

ABOUT

Thomson Reuters

Thomson Reuters is a global content and technology company providing trusted intelligence to professionals in legal, tax, accounting, compliance, government, and media. Thomson Reuters' legal products — including Westlaw, CoCounsel Legal, and Practical Law — are the gold standard for legal research, workflow automation, and trusted AI in the legal profession, trusted by attorneys in firms of every size.

legal.thomsonreuters.com

ABOUT

Bob Simon

Bob Simon is a trial attorney, co-founder of Simon Law Group, and one of the most influential voices in plaintiff law and legal technology. A nationally recognized PI litigator, he also co-founded Justice HQ — a community platform for plaintiff attorneys — and Attorney Share. Bob is a leading advocate for ethical AI adoption in law and a sought-after speaker, coach, and educator for PI firms embracing the next generation of legal technology.

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