



## How to Work More Effectively & Efficiently to Win More Business and Win More Case

Tune in and watch and our panelists Greg Lambert from Jackson Walker and Daisy De Anda from Sheppard Mullin for this highly informative recorded webcast.

In just 30 minutes you'll see:

- How Lex Machina can help save your firm countless hours as we contrast how functions like early case assessment are performed in Lex Machina relative to what these functions look like without Lex Machina.
- How Lex Machina can dramatically increase your response times to your clients.
- How invaluable insights to assist in winning business and winning cases can be uncovered in just a few clicks.

Lex Machina is profoundly changing the business and practice of law and you don't want to miss out.

### Speakers:



Daisy De Anda  
Legal Research Specialist  
Sheppard Mullin



Greg Lambert  
Chief Knowledge Services Officer  
Jackson Walker



Kelli Jones  
Customer Success Manager  
Lex Machina



Neil Magenheim  
Sales Director  
Lex Machina

Kelli Jones ([00:00](#)):

30 minute webcast on how to work more effectively and efficiently to win more business and win more cases by using Lex Machina. My name is Kelli Jones and I'm a customer success manager here at Lex Machina. I'd like to begin with a very short overview of Lex Machina For those of you who may be seeing it for the first time. Lex Machina provides legal analytics for both federal and state court litigation. And to put it very simply, legal analytics help you win business and win cases. More specifically, we enable you to make data-driven decisions that answer questions like how do I convince a prospective client that I'm the best attorney to represent her company in a new case so that I can win the business or how has the judge, opposing counsel, and parties likely to behave in my case and what is the best litigation strategy to win that case?

Kelli Jones ([00:55](#)):

We do all of that by leveraging technology so that you can work more effectively and efficiently. Lex Machina is used by a wide range of customers from AmLaw 100 firms to Fortune 500 companies all the way down to one and two person boutique firms. In other words, Lex Machina's legal analytics are accessible to everyone, regardless of the size of your organization. At this time, I'd like to introduce Neil Magenheim, who is one of our sales directors at Lex Machina and will be co-hosting today's webcast with me. Hi Neil.

Neil Magenheim ([01:31](#)):

Hi Kelli.

Kelli Jones ([01:32](#)):

I'd also like to introduce our guest panelists, both of whom are longtime Lex Machina customers. First, we have Greg Lambert, who is the chief knowledge services officer at Jackson Walker in Houston, Texas. He's the former president of the American Association of Law Libraries. Greg is the founding blogger of the very popular three Geeks and a Law blog and co-host of The Geeks in Review podcast. Welcome to the webcast, Greg.

Greg Lambert ([02:01](#)):

Thanks Kelli.

Kelli Jones ([02:02](#)):

Second, we have Daisy De Anda, who is a dedicated legal research specialist in Sheppherd Mullins Research and Knowledge Center in Los Angeles, California. With an eye for reliable and actionable information, Daisy takes pride in assisting attorneys from around the world in a wide range of legal and industry fields, ensuring the success of her firm's domestic and international clientele. She's also on the executive board of directors of the Southern California Association of Law Libraries and has previously served as a chair of their public relations committee. Thanks for joining us today, Daisy.

Daisy De Anda ([02:40](#)):

Good morning, Kelli. Happy to be here.

Kelli Jones ([02:43](#)):

Our format today will be broken into two sections. Using Lex Machina to work more effectively and efficiently first to win business and second to win cases. One quick housekeeping tip before we get started. If you have a question during the webcast, please submit it using the Q&A button at the bottom of your screen. We'll follow up with everyone individually after the webcast to get you the answers you need. I'll now turn the time over to Neil to lead our first section.

Neil Magenheim ([03:14](#)):

Great. Nice job, Kelli. Thank you again. Thank you again to Daisy and Greg for joining us. So let's get right into some questions, right to you, Greg. How active is your firm and your group in pulling background information on potential clients and your competition to help your attorneys and your firm win business?

Greg Lambert ([03:35](#)):

So we do a lot. My group, we have a number of what we call research attorneys and we work in [inaudible 00:03:44] with our business development team as well. So we do a lot of the due diligence and background investigation on clients that we're doing to make sure that we're representing [inaudible 00:04:00] completely. We understand their legal issues, not just right now, but what their overall legal needs are. And as far as the competition, obviously the more you know about the competition, the better off you're going to be to prepare for them. We do a lot of those types of due diligence and background investigations.

Neil Magenheim ([04:26](#)):

That's great. Thanks for that insight. Are you able to share with us maybe one or two examples of how Lex Machina has made your firm more effective and more efficient in those areas?

Greg Lambert ([04:35](#)):

Yeah. So one of the things that Lex Machina does is it gets us quality information in a short amount of time. I know that even though we have billers on our staff, that time is of the essence. And a lot of times we get requests that we need a very fast turn around on. And to have a system like this where the information is normalized across different types of matters, different types of clients, industries, that really helps us be able to rely on that data [inaudible 00:05:17] more time doing more of the analytical than just the data pools on that. So that's where Lex Machina really helps us.

Neil Magenheim ([05:25](#)):

That's great. That makes a lot of sense, Greg. Thank you. So let's get right into the demonstration here. And let's say that your firm is looking to generate new business with a new corporate client and that target is Equifax. You'll see here, Kelli's about to pull up some of Equifax's data here in Lex Machina. And this is one of the more popular use cases in thinking about using the data to help speak Equifax's litigation language. So you can see here, Kelli is about to go pull up Equifax's consumer protection cases. And as she pulls that up, we're going to start to be able to do very effectively is to identify trends in Equifax's litigation through their outcomes. So for example, we're able to see how likely they are to move things along quickly or not by looking at our timing analytics. So what we do here is we extract the key events or key milestones from the sets of cases that we're looking at. Again, consumer protection cases involving Equifax here.

Neil Magenheim ([06:29](#)):

So we can see what are their tendencies. These are really powerful nuggets of information to arm your attorneys with when they're sitting across the table from Equifax or putting together some sort of proposal or an RFP. The next piece to identifying, understanding the trends and speaking their language is the case resolutions data. So what we're doing is we're seeing here very quickly and effectively how likely it is for Equifax to settle their cases. We could see that they've settled over 75% of their consumer protection cases. Okay.

Neil Magenheim ([07:03](#)):

We could see how often they win when cases that go to ruling or judgment, how they win, how they lose, et cetera. So we're building outcomes here based on what it is we're looking to accomplish, to understand Equifax's litigation profile so we could differentiate our service offering to line up with their strategies and their tendencies. The last piece here that I'll emphasize, it's a damage analysis. So our damage analysis very quickly and effectively shows you what money changed hands in the sets of cases that we're looking at. Again, Equifax is consumer protection cases. So we could see where they've been effective or not. And we could very effectively get into those underlying documents and docket entries to see how and why those damages were awarded.

Neil Magenheim ([07:52](#)):

So Kelli's going to go head over back now to the summary tab here, but I like to ask a question to Daisy. Daisy, how are you able to find out which firms represent a prospective client such as Equifax without using a tool like Lex Machina?

Daisy De Anda ([08:14](#)):

So typically a search of this magnitude would require some pretty searching into dockets, which then would require a pretty lengthy docket dive into each case to research firms and opposing counsel information and their patterns, as you mentioned. As Greg also mentioned, time is of the essence. And in most cases, clients and attorneys expect a very quick turnaround time. So this would be very time consuming and it would require we do it ourselves from scratch sort of speak and download masses amounts of information and create our own quote unquote reports or spreadsheets to then share with our requesters, which in turn, our attorneys.

Neil Magenheim ([09:04](#)):

That's great. And Daisy, thank you for sharing that. We're going to take this analysis now to the next level, because it's very important that you're thinking about developing business with a new prospect or a new target. You really want to get an understanding of what law firms are representing your potential target. Again, Equifax's consumer protection cases here. We could see within seconds what law firms are representing Equifax here. So we could see, you can kind of qualify in and qualify out what type of demographic your firm has in and where you're coming from. Do they work with firms in your demographic? Do they tend to work with larger firms or smaller firms? So you could see within seconds, we could look at the relationship between a prospect of target and their law firms.

Neil Magenheim ([09:51](#)):

And for purposes of this conversation, we want to look at the relationship between Equifax and Clark Hill. So again, what we're going to do now is zoom in on that relationship between Equifax and Clark Hill and you could see the nearly 1900 cases here where Equifax has been represented by Clark Hill in consumer protection matters. We could see the trends year over year. We could see the courts and the

judges that they're most frequently in front of. But what we care about is being able to now look at those outcomes and those trends again, based on this relationship. So we could very effectively look at timing. How long is Clark Hill taken to get to these key events or key milestones when representing Equifax? We could look at the case resolutions. How effective are they? Right. So now we're starting to use data to put together critical questions about a relationship that we're trying to now develop where existing relationships are already happening.

Neil Magenheim ([10:49](#)):

Right? So we could look at the timing, we could look at the resolutions, and we could look at the damages. What money changed hands in consumer protection cases where Clark Hill is representing Equifax? So we're answering questions within seconds. How effective is the relationship? The other piece that I want to emphasize here this, if Kelli scrolls down and looks at our case list analyzer here, we could see here are all 1900 of those cases. And we can model the data to answer very critical questions in real time like how frequent is the relationship, how recent is the relationship? So those are three really important questions that were answering with Lex Machina in seconds. Again, how effective, how recent, and how frequent is that relationship? So Greg, question to you. We just showed you in a few clicks how to find out whether a competitor has been effective in representing a prospect of client. How would you connect those dots otherwise without Lex Machina?

Greg Lambert ([11:48](#)):

Well it kind of goes [inaudible 00:11:51] that you, we [inaudible 00:11:55] go in and get some kind of data dump from the appropriate courts, hoping that we picked the right courts based on our research in the news and in other legal dockets to try to isolate those. And I think we would end up with a terrible [inaudible 00:12:14] in Excel that we're just making a best guess. And then when that's all said and done, we would probably fire out the partner an email just to make sure that we fill in any of the holes that our research didn't find. So having a tool like this that has access to all of the dockets that are important, that again, normalizes the information. There'd be the attorneys with the law firms with the matter types across different types of dockets. You just can't compare how much time and effort it would take to gather that information without a resource like this.

Neil Magenheim ([13:03](#)):

That's amazing context, Greg. Thanks for magnifying what we were just talking about there. I'm going to transition it over to Kelli, but I do want to share one quick testimonial with the audience. We have a very diverse set of users. We have partners and associates and attorneys in between as well as information professionals and business development and knowledge managers. This very important testimonial came from the partner who runs the patent litigation group at a firm in Boston. And he said, "Using Lex Machina to win one piece of business will justify the expense for years to come." So again, using data to demonstrate your areas of expertise to drive new business. Very powerful and popular use case here. And that's it for my session. I'm going to transition over to Kelli to pick up on the winning cases aspect of the conversation.

Kelli Jones ([13:54](#)):

Thanks Neil. Daisy, let me start with you. How often does your team receive requests to pull information on judges, opposing counsel, and parties for the attorneys who are working on early case assessments?

Daisy De Anda ([14:08](#)):

That's a really good question, Kelli. At our firm, we get these types of requests on a daily basis for both federal and state. So much so that we've developed a workflow to attempt to standardize these types of requests. We cannot compile judicial profile reports specifically for judges that include their rulings and outcomes. And as these analytics become more accessible to us, we've been able to provide a wider range of information, including opposing law firms and individual attorney analytics.

Kelli Jones ([14:45](#)):

And as a follow-up question, what type of deadlines are involved when your team is asked to respond to these requests?

Daisy De Anda ([14:54](#)):

So it's no news that in our line of work the need for speed is not only necessary, but it's expected. Our firms and attorneys rely on us having the capability to produce these analytics in the most cost efficient way for our clients. 99% of the time that means as soon as possible, right? So as you can see, this platform can provide this information very quickly and efficiently in a matter of minutes as opposed to a lengthy research dive that could take hours on end to do manually, as Greg mentioned.

Kelli Jones ([15:31](#)):

And I think it's pretty safe to say that is probably the situation with all firms these days, that the expected turnaround times need to be really quick. So let me walk through how Lex Machina can help with that by helping firms effectively and efficiently perform early case assessment. And here's a scenario we'll begin with. So let's suppose that your firm represents a contractor that's been sued by Sunbelt Rentals in the district of New Jersey for breach of contract where your client is the contractor and it involves a lease of heavy equipment for construction site. Judge Susan Wigenton has been assigned to the case and you need to find out how this judge has handled similar cases in the past to help the attorneys formulate a winning litigation strategy.

Kelli Jones ([16:19](#)):

So how we would perform that piece of the early case assessment at Lex Machina is to start up here on the courts and judges tab, type in the name of the judge, and then we can very quickly jump into the judges analytics. But before we go further, we always want to customize the analytics to make them relevant to our particular situation. So I can come over here to the left and filter down to not only contracts cases, but customize even further to commercial litigation that involves a breach of contract. And now when I update the analytics, the set is more relevant to our particular situation. And I can move through the different pages to gain some insights on this judge. So the first thing I can see is the number of commercial breach of contract cases that have been assigned to her over the years to see whether she even has experience in this area and I see that she does. I can look at timing to advise my client on how long it takes to reach different litigation milestones in the case.

Kelli Jones ([17:24](#)):

For example, I can let my client know that to reach summary judgment there's a median of 735 days between the filing of the complaint and issuing a summary judgment order. I can look at case resolutions. And here I can see the proportion of cases that have settled in the green versus whether this judge, for cases that don't settle, favors plaintiffs in the red or defendants in the blue. And we actually break down how the plaintiffs and defendants won. So you could dig even deeper into those particular types of cases. Back up at the top, I can look at damages to see what types of damages have

been awarded in these cases, including attorney's fees. And then a very popular page on our analytics for judges is the motion metrics report.

Kelli Jones ([18:20](#)):

And here we give you a list of dispositive motions that we're tracking and the grant denial rates. So another data point that you can provide your client in deciding what your litigation strategy would be. For example, whether to even file a summary judgment motion down the line. And here we can see on the right that this judge in commercial breach of contract cases, grants these motions only 35% of the time and denies them 53% of the time. So that's an enormous amount of information just on this one page that I was able to get to in a few clicks. And finally, we can go to our findings, which are rulings on different areas, points of law. And these are very specific to the particular practice area that we pulled up here. And we can go right to the judges orders where he or she has, for example, found that there has been a breach or no breach. So Greg, let me go to you. And could you give us an idea of what it would take to pull this type of information on judges if you didn't have access to Lex Machina?

Greg Lambert ([19:25](#)):

Yeah. I don't necessarily [inaudible 00:19:27] because we still do it because we do a lot in some of the state courts here in Texas, especially if we get out into West Texas. We have to buy access to the docket information and a lot better with a somewhat centralized docketing system, but [inaudible 00:19:48] of counties that we practice law [inaudible 00:19:53] yet. And I'm coming from this as I do statistical analysis. I understand our programming and SQL and all of that. And even me with my expertise Mine would be more of a guess at it.

Greg Lambert ([20:16](#)):

I'm hoping that I've got the right information, hoping that the information is put into their system correctly and then again, referring back to what [inaudible 00:20:27] and then supplementing that again, by reaching out to the attorney's, if they had anything to fill in on the details. So the really nice thing about this coming from a view of a data geek like myself, is that you have the information, it's set up, you already have this typical [inaudible 00:20:48] and that makes it a lot easier again for us to get that information and then focus in on the things that are really important to win business or get information to the attorneys in order for them to manage cases better.

Kelli Jones ([21:04](#)):

Thanks. I think that helps our audience really understand the amount of information you can pull up here in a quick turnaround time. And that's really a common thread that I hear from our customers that attorneys and clients really do expect those quick turnarounds. So Daisy, once you've found what you need in Lex Machina, how do you pass that information back to the attorneys on a quick basis?

Daisy De Anda ([21:31](#)):

So on this platform, there's just so many different capabilities we have available to us that really help share this information to our attorneys, but also keep in mind that information may end up in the hands of our clients, right? So it's really nice that it's put together in a way that anybody can really look at it and be able to draw from the data that's being presented. Lex Machina comes in very handy as it makes it extremely easy for any user to obtain the information, whether you have extensive knowledge or you're brand new to the platform and you're a first time user.

Daisy De Anda ([22:08](#)):

Attorneys can customize reports to be shared with their clients at any given time really, whether that's part of a pitch to gain new business or advice the client on a litigation strategy. So specifically for us here internally, I can give you an example. We spoke about judicial profiles earlier and we can begin to provide these reports in PDF format. At least that's how we used to do it. And we found that actually sharing the link was much more preferred. So that's another option. As attorneys will do further digging for themselves in the platform. Once they are in it and filter the information and the data for themselves, sometimes new questions arise, right?

Daisy De Anda ([23:00](#)):

So as they're seeing the data for the first time. Another thing to note is being able to share the information with our attorneys so easily. When we give that tool to our attorneys to then drive sort of speak for themselves, then they can really dive into the data and can feel that confidence in the information that's being provided to them.

Kelli Jones ([23:22](#)):

And thanks for raising that point because that is important that Lex Machina, in our customer base, is used by all types of roles within a firm. And that's paralegals, associates, partners, librarians, knowledge management staff. And yes, we do have partners that get hands-on and jump right into the data because the system is easy to use. So thanks for giving us those examples.

Kelli Jones ([23:47](#)):

I'd like to take our hypothetical to the next step of early case assessment and that would be to size up opposing counsel. So here let's suppose that the plaintiff is represented by Connell and Foley. So I could start on the counsel tab up at the top and just type in the name of the firm to pull up their analytics. And you'll see here I'm on their overview page and Lex Machina will roll up for you all of their federal district court cases, along with the state court cases for the courts that we cover.

Kelli Jones ([24:18](#)):

I'll jump into the federal court cases. And the layout is exactly the same. So it's very easy for me to customize these analytics again to commercial breach of contract cases. You can see here that it's just a few clicks and you can also see how many other different types of filters we have for the practice areas that we cover. And one of the filters I haven't shown you yet that is key is our party role filter. So now I can narrow down to just this firm's cases, commercial breach of contract, where they are on the plaintiff side.

Kelli Jones ([24:53](#)):

And so as we've talked about in the past, I can see the experience in this type of case for this firm and they do have experience. And in particular, our hypothetical, the case was filed in the district of New Jersey. And I can see right off the bat that is where this firm handles most of their commercial breach of contract cases. And in fact, the highest proportion is before judge Wigenton. So this firm definitely has experience in this type of case before this type of judge. Some other quick insights I can get by clicking on our parties link, I can see what type of clients this opposing counsel has represented to see if they've litigated against clients like mine in the past, I could look at those case resolutions to see how successful they've been, including what damages have been awarded in their cases, and I can also explore other

links up at the top for additional analytics. Greg, back to you. We can see it's quick and easy to pull analytics on the opposing counsel. How valuable are these types of insights for your firm?

Greg Lambert ([25:59](#)):

It's [inaudible 00:26:00] one of the things that this really helps me with is, and I think a lot of people on the call understand this, is a lot of times the first question that you get from the attorney is not necessarily the one that they really want to know the answer to. And so by using something like this, getting a quick [inaudible 00:26:18] on the information, getting that back to the attorney, and letting [inaudible 00:26:23] come back to us and say, "That's great, but what I really want is this other thing." And we get that a lot. The other value of this about being able to know that you get organized information in a quick way to break that information down is that a lot of times the people that have the most value from Lex Machina, we never hear from because they're doing this themselves. So they're able to go in, get the answer, dive deeper into the information, and then make quick decisions [inaudible 00:27:03] value there that as the research staff, we may never see that because the attorneys are doing that themselves.

Kelli Jones ([27:12](#)):

Thanks for expanding on that. I think it helps our audience to hear more of the details behind that. So to round out our hypothetical with a third step of really case assessment, that could be to evaluate the opposing parties behavior in prior litigation so we can anticipate how they might behave in this case. And so in the interest of time, I won't go through all of the steps to pull up the analytics. I'll just note that it's very easy. I would just start on the parties tab. I would put in the name of the opposing party and I'm able to pull up the analytics, jump right in to the cases, apply my filters, and then go through the different pages to gain some additional insights. So thank you both for sharing your experience with Lex Machina. And Neil, I'll turn the time back over to you to wrap up our session.

Kelli Jones ([28:08](#)):

Neil, I think you're on mute.

Neil Magenheim ([28:11](#)):

Sorry. Thanks Kelli. So we just showed and talked about how Lex Machina's legal analytics helps you increase the odds of winning in such a competitive environment by landing more clients and winning more cases. Showed you how quick it is and how customizable it is. We're also able to effectively contrast that to how you'd be able to accomplish these critical tasks without Lex Machina. So I want to thank Greg and Daisy again for all your hard work and insights. Also want to acknowledge all the questions that were asked during the webcast. We will follow-up individually with all those questions and the answers as well. Everyone that's on this webcast will receive an email later today with a link to the recording. We strongly encourage you to share the link with your colleagues as well as if you respond to that email, we could set up a brief personal custom Lex Machina presentation where we could look at Lex Machina through the lens of your cases, your clients, your matters, et cetera. Thank you everyone for taking the time to attend today. This concludes our webcast.