



Tips & Tricks - How to Win with Lex Machina

Watch our recorded webcast: Tips & Tricks - How to Win with Lex Machina. You already know that Lex Machina helps you find actionable insights into judges, courts, law firms, attorneys, and parties that aren't available anywhere else. Join us as we take you on an even deeper dive into the world of Legal Analytics.

During this webcast, we discussed the Top 10 tips and tricks that will take your exploration of Legal Analytics to the next level. We will teach you the techniques that the experts use to get the most out of our incredibly powerful analytics.

Speakers:



Sherrill Dresnin
Customer Success Manager
Lex Machina



Joshua Harvey
Manager of the CSM Team
Lex Machina



David Friedman
Customer Success Manager
Lex Machina

Joshua Harvey ([00:00](#)):

And I lead the customer success team here at Lex Machina. Just a few housekeeping items before we get started. This webcast is scheduled to last 30 minutes. We do hope to have some time for some Q and A at the end. So please feel free to submit questions via the Q and a button. I also encourage everyone to write their own favorite tricks or tips for using Lex Machina, And we're going to do our best to collect and share those after the webcast.

Joshua Harvey ([00:28](#)):

So if you're watching this webcast, you probably already know about Lex Machina. We're a legal analytics company. We provide actionable insights, like judges, courts, lawyers, law firms, parties, and issues. And most importantly, we help our users win. We help them win cases and win business. Lex Machina provides incredibly powerful legal analytics on a very user-friendly platform. And our customer success team is positioned in a way that we are able to field questions from every type of user, from users that have never used the tool before all the way to kind of our most expert users. And the purpose of this webcast really is to provide some of the best tips and tricks that we've gotten over the course of kind of helping our users get the most value out of their analytics.

Joshua Harvey ([01:17](#)):

So with me today, I have David Friedman, who is our customer success manager who's based in the Dayton Ohio region, and Sherrill Dresnin who's our customer success manager based in the Philadelphia area. Welcome David and Sherrill. Both David and Sherrill work with users across our entire spectrum of our client base.

Joshua Harvey ([01:45](#)):

All right. So let's go ahead and jump in. I'm going to go ahead and go live into Lex Machina. So let's jump right into these tips and tricks. As I was thinking about kind of some of the questions and the use cases that we might want to cover for this webcast, I was thinking of some of the most recent improvements that we've made to Lex Machina and how those improvements have really helped our customers show. Sherrill, you probably remember that for a long time, if users wanted to see how many times a law firm had been up against another firm in litigation, we could do that, but it wasn't the most direct way to do that.

Sherrill Dresnin ([02:23](#)):

Yep, that's absolutely correct. So definitely, one of the most frequently asked questions that we'd get, or that I would get, and I used to have to direct customers to run their search, searching through the council analytics. So once you navigate to the council analytics and type in your firm name, then you'd have to then customize the columns in your case list analyzer.

Sherrill Dresnin ([02:50](#)):

So let's say we wanted to see how many times McGuire Woods and Morgan and Morgan were involved together in consumer protection cases. So as you can see on your screen, we're looking at the analytics for McGuire Woods and specifically applying the consumer protection filter. And as you can see, we're looking at the case list and we see altogether, there are 2100 consumer protection cases from McGuire Woods.

Sherrill Dresnin ([03:21](#)):

So previously we'd come to the case list, we'd customize the columns, and we could add a column for both plaintiff's law firm, as well as defense law firm. And then you could export the Excel spreadsheet, do some analysis and be able to see and sort the columns and see how many times the firms were up against one another. So now, we can run the law firm report. So if you click on where it says law firms, and then you click the blue button that says law firm report, we can quickly see all of the law firms that McGuire Woods is up against or on the same side, so opposed to, or on the same side.

Sherrill Dresnin ([04:06](#)):

So when I see Morgan and Morgan, I can click onto the 58 cases, and I can see all of the times and all of the cases and the analytics that Morgan and Morgan and McGuire Woods have been in together. So we can see who's prevailed. We can see what courts they're in. We can see the timing and so forth.

Sherrill Dresnin ([04:28](#)):

You can also run law firms reports when looking at parties, jurisdictions, or judges to determine which firms have the most experience. So whether it's law firm clients wanting to understand their opposition or corporate clients wanting to determine how many times they've been opposed to, or involved in a litigation involving a particular law firm. So the law firm report has proven to be a time saver and an invaluable asset for all of our customers.

Joshua Harvey ([05:00](#)):

So I was really happy when we made that enhancement to be able to run that law firms report where you could do that side-by-side comparison. And that feature, the idea of kind of doing that report was something we always had with the party's report.

Sherrill Dresnin ([05:16](#)):

Yep. Parties report. A common question we would get from business development professionals or marketing people or attorneys, who are the most active litigants in a particular practice area or jurisdiction? Who's suing them? So let's say we wanted to gain insights about trademark litigation in the central district of California. We can come into the federal court analytics, again, apply our filters for central district of California, as well as our case type for trademark. And we can see the analytics for the top law firms, as well as the top parties. And once we do that, we can see that of all the parties, we can see, we can sort by defendant. And we can say, who were the top defendants. I can quickly see target has 34 trademark litigation cases. And if we click into those 34, we can quickly see the analytics for those.

Sherrill Dresnin ([06:23](#)):

Now on the flip side, as we're live in here, we can, once we see the analytics for these 34 cases, we can actually now see who's suing target in these trademark cases. And we can run a party report here and see the analytics, and see the case list for, and we click on the party report here, we can. Now, if we sort by plaintiffs, we can see who's doing target and we can see there's lots of different plaintiffs here. So we can see only two of these plaintiffs have more than one case. So you can see as we scroll the list, lots of different plaintiffs suing target in trademark litigation.

Sherrill Dresnin ([07:05](#)):

So again, having the ability to customize and download a spreadsheet before now with these parties report in the same way, it allows us to get a nice, clean, easy table to see who the most litigious parties are and see who the additional litigants are and what kinds of cases are being filed.

Joshua Harvey ([07:24](#)):

Yeah, it's been really nice to be able to use those reports, the parties reports and the law firm reports.

Joshua Harvey ([07:30](#)):

Our data analysts do a really good job of tagging cases and documents. This allows users to use those tags to really refine their searches. And of course, we also have the ability to run keyword searches. David, you recently mentioned that a lot of users actually kind of struggle with keyword searching.

David Friedman ([07:49](#)):

Yeah, Joshua, I've noticed a lot of users that seem to start their searches with the keyword search box, and I think that's because that search box is at the top of the filter panel. But it's important to realize Lex Machina has already done a lot of the workforce for the users. You can narrow results set with filters and with tags. So it might turn out that you don't even need to do a keyword search or the keyword search could be the [inaudible 00:08:14] to doing a successful search.

David Friedman ([08:15](#)):

So a good example is a lot of times, I think it's good to start these kinds of searches in the documents tab because after you've run the document search, you can toggle to the underlying case set and then you can toggle back to the documents. That gives you more flexibility. So an example would be, you could start in documents, you could select a court such as Southern district of New York. You could apply a case tag such as the class action case tag. And depending on the results you get, you might already have what you need, you might not need a keyword search. But if you're still looking for an additional refinement or something very specific, the keyword search could be the final element after you've applied those filters.

David Friedman ([08:52](#)):

So an example from a recent training session I did, motion within 10 words of remand with the filters that we've already applied. And then you run the search and you see the documents that are associated with that search. And then you can, after you run the search, there's always going to be that link that says from these court cases and the breadcrumb trail, you can click on that to see the underlying case set.

David Friedman ([09:23](#)):

And another thing that you can do, so you can do that and you can see how many cases there are. The first view was showing us how many documents matched our keywords with the filters we applied. Then we saw the underlying cases. Now at this point, then you can do what we might call post search filtering. So we have document tags. So maybe you look at this results that you see the size of it, and you say, "Okay, I want to narrow this keyword search in this court, in this class action case tab, just to documents that orders regarding dismissal. So Lex Machina has a document tag for that. So you can apply that filter, and then now we're down to 122 documentaries. So I think that's a very effective way to search and to be able to toggle back and forth and to see the results.

Joshua Harvey ([10:07](#)):

So that was an example of starting really narrow to getting to a really specific set of documents or searches. The alternate is helpful as well, where you can start really broadly across a broader search set and then narrow it down from the broadest set of cases as well, right?

David Friedman ([10:27](#)):

Yeah. And I think it's particularly useful when you're looking for cases. The previous example was we're looking for a specific document from a certain kind of case in a particular court. But sometimes when you are looking for cases, you don't know at the start, how large or small your case study is going to be, you might also be interested in looking at broad litigation trends across the country, before the narrows down. So I recommend for this kind of search, start with the federal tab, and then we go to cases. And then by progressively applying filters, you're starting broadly. You're not missing anything. So like we start with employment. So we see how many employment cases there are nationwide. We can see the year to year filing trends. And then we can say, "Okay, now I want to zero in on a particular court, for instance, Northern district of Georgia. And we can apply that filter and then see what does that do? How many of these cases are just in that particular court?"

David Friedman ([11:21](#)):

And then when we see the size of that case then we may say, "Okay, I want something a little bit smaller, a little bit more refined." We have case tags within employment and all of our case types. So we could apply a tag for employment discrimination. So we started out very broadly. We now make sure one, we don't miss anything, two, we're able to see broad litigation trends. And then by applying the correct filters, we narrow further and further down. And then you have the case list analyzer, where you can see all of the analytics for the subset of cases that are relevant, the timing, law and parties, as you were looking at previously, case resolutions, damages, remedies, motions, and so forth.

Joshua Harvey ([12:00](#)):

Yeah, that really is a great way to get to a case set that's really most relevant to the litigation that you're working on.

Joshua Harvey ([12:08](#)):

So Sherrill, the meat and potatoes of Lex Machina has always been finding actionable insights about judges, lawyers, law firms, parties, and courts with our legal analytics. And lawyers really love using Lex Machina to find out for instance, how a judge might rule on a specific motion and a specific type of case. But one of the things that lawyers often want to do, and maybe don't even know that they can do in Lex Machina is find a particular type of document that might've been filed or used in front of a specific judge.

Sherrill Dresnin ([12:39](#)):

Yes, that is a great point. And just the other day, I was working with an attorney who was trying to find examples of summary judgment orders in front of judge Albright, specifically with the phrase mutual mistake in it. So we can search directly in the documents as you saw, so federal court documents. We can search by judge, so applying our judge filter for judge Albright. And then you'll notice we have specific document tags. So we can actually go right to judge Albright's summary judgment orders, and we can apply that filter. And you can also see all of the other types of document tags we have as well. And then we can apply our keywords like you saw before. We can add in mutual mistake. And from

there, we can see and get right to examples of judge Albright's summary judgment orders, where we see mutual mistake. So here we are at one order, specifically referencing mutual mistake. So instead of having to search all summary judgment orders, having to read through them, we can help you with that by using the keyword functionality to get right there.

Joshua Harvey ([13:51](#)):

All right. So we've already covered five really useful tips and tricks. Let's go ahead and start to count down the top five. David, where do you think we should start?

David Friedman ([14:00](#)):

A lot of times I get questions from customers. They want to look up multiple attorneys. What's the fastest way to get the analytics about a lot of different individual attorneys? And what people might not realize is we actually have a shortcut where you can do that. You can look up more than one attorney at a time, and that's the attorney team analyzer app. Now the priority for this app is to put in the names of attorneys who have worked together on the same case and see how often if they work together, what outcomes have they obtained. But there is another use case for this app where you can type in, let's say you have a list of 15 attorneys and you want to look them up as quickly as possible. Instead of running 15 individual searches, you can type in the first five names in the app, run the search. And even if they've never worked together on a case, you will still see as you see the list here, these five attorney names, and it shows how many Lex Machina cases of theirs are in Lex Machina for each of those five attorneys.

David Friedman ([14:56](#)):

And then, so instead of running 15 individual searches, you could just run three searches attorneys at a time. It's a great little shortcut to do a task like that as efficiently as possible with as few clicks and as few searches.

Joshua Harvey ([15:10](#)):

Yeah. That's a really great way to take advantage of some of the features that we've already put in there and using it kind of in a unique way. I'd never thought of that, so I appreciate you sharing.

Joshua Harvey ([15:20](#)):

All right, Sherrill, what do you have next?

Sherrill Dresnin ([15:23](#)):

I'm going to go with an oldie but goodie, and that is using the party search to create a party group or an industry group. We get lots of users that want to run analytics on a particular industry. I recently worked with a customer who wanted analytics for employment discrimination cases involving Big Buck stores. Specifically we can search for parties like Walmart and target and add the individual entities to our search. So as you can see, as we add Costco, we can then add it to our search, create a group that we want and is relevant to us. We can view then click on the blue button and view the litigation and analytics for that group.

Sherrill Dresnin ([16:10](#)):

So once I have this, I can see the analytics for this group that I've created. And I have the ability to now, once we come into the cases, I can see as a whole. So instead of running individual searches and combining them together, I've got my analytics for my industry. I can then save that as a party group to access again. So you have the option at the top to save as a party group, and as you can see, we can also filter to our employment discrimination cases as well, and now we've got the analytics for employment discrimination for our big box stores, and we can see where the cases are filed, who's representing these parties in those cases.

Sherrill Dresnin ([17:01](#)):

So again, being able to combine the parties together and look at industries, come back, whether it's saving it as a favorite or an alert, this is a great feature that you can customize for yourself.

Joshua Harvey ([17:19](#)):

Yeah, that's really great. We've always been committed to providing clean data and features that really allow our product to do a lot of the work for users. Our product team, I like to brag about them, they really do a great job of kind of doing the dirty work behind the scenes to create this power functionality. One great example is our motion metrics support, which allows users to see motion chains from a particular judge. And they can see things like motion outcomes, see the actual documents and even see grant denial rates.

Joshua Harvey ([17:52](#)):

David, you found some pretty cool ways to be able to kind of combine the motion metric report with another search. Why don't you tell us about that?

David Friedman ([18:01](#)):

Yeah, absolutely. The motion metrics report, as you mentioned, that's the way you can find out the grand denial rates for a particular judge for a particular kind of motion.

David Friedman ([18:11](#)):

And so we could take an example, judge Doherty motions to dismiss in product liability cases. And so this helps you make data-driven decisions. That's the value of this. We want to understand is it worth it to file this motion? What's the likelihood of success? And then when we look at the grant denial rate, and so we're going to look at motions to dismiss and an in product liability cases for this judge, and we're going to see the grant rate. So when you hover over the particular motion type, the grant rate for this judge is 81%. You see the national average is lower than that. So this is a motion that has a good likelihood of succeeding. So that's the first part of this process. We make good data-driven decision. This is what we want to do.

David Friedman ([18:51](#)):

The next step is to go to the motion Kickstarter app, put in the name of the judge, the motion type, which is motion to dismiss the case type. And what we're going to see in the motion Kickstarter app is up to 10 most recent examples where this judge has granted this kind of motion. And then up to 10 most recent examples where the judge has denied this kind of motion. And we're going to see the underlying motion chain, so we'll see the arguments that were made, or you can see if you go into the document. So the arguments that were made, the case citations that the judge found to be persuasive.

David Friedman ([19:24](#)):

And so what I often say about this, the quick summary is, a judge is unlikely to say, "I disagree with myself." Once you can see the arguments that this judge found to be persuasive, you can craft your motion strategy accordingly, you're maximizing your chance for success. The motion metrics report is letting you know this motion is likely to be successful. The motion Kickstarter app is showing you why the motions have previously been successful.

David Friedman ([19:48](#)):

You can also look at the examples where this motion was denied by this judge, and you can see what arguments and case citations the judge did not find to be persuasive, and then understand these are not arguments or case citations that we would want to use in this situation.

Joshua Harvey ([20:05](#)):

That was really cool, David, thanks for sharing that.

Joshua Harvey ([20:08](#)):

So Sherrill, I know you've always done some really neat things with our alerts, which are obviously incredibly valuable because they allow you to push out search results to a user. Do you have one specific type of alert that you found to be most kind of popular with your customers?

Sherrill Dresnin ([20:26](#)):

Yeah. Lately I've been doing a lot of alerts with customers, focusing specifically on our documents and using our case tag functionality that we have. And one thing in particular, this is a great example, you have the ability in our documents to add specific of documents. So let's say I wanted to be updated and find out all of the opinions or orders and decisions involving COVID-19 cases where there's a tuition reimbursement claim. So you have the ability to, we add the types of documents and we have our case tags. So as you may be aware, Lex Machina has a case tag for COVID-19. So we're specifically pulling out those cases that wouldn't have been filed, but for the pandemic. So there have been numerous cases pertaining to tuition. So if we wanted to be updated any time, any judge in any jurisdiction issues an order or an opinion, we can set an alert. So you can set the alert.

Sherrill Dresnin ([21:44](#)):

Now we've got our result list up here showing 64 docket entries that refer to orders or decisions, with our keyword of tuition, and specifically have been filed as a result of COVID. So when I click on the star, I can now create the alert and have it notify me either daily or weekly of any new opinions or decisions involving tuition and COVID.

Sherrill Dresnin ([22:17](#)):

So I like the ability and the flexibility to use our filters and get right to cases and decisions as this is an evolving area. So it's a great way. Save yourself some time. Set up the alerts, and you can look at your emails and link right out from your email to any new orders or decisions.

Joshua Harvey ([22:42](#)):

It's really great to be able to get those notifications pushed you. And it's also really cool, honestly, that we've been able to kind of keep up with times, with current events to add some of the COVID

functionality because that really is a question that we're getting from just a ton of our customers, what are the best ways to track litigation that are kind of going along with COVID?

Joshua Harvey ([23:05](#)):

All right, well, we're coming to the end. We've so far covered nine really great tips and tricks, again, these are coming from questions that we get on a regular basis from our customers. So David, I'm going to leave it to you to finish this off with our number one tip. And I think you went for something that maybe we wouldn't think of as the most creative tip, but it really is kind of one of the most common questions that we get. And so I'll leave it to you to finish this off here.

David Friedman ([23:32](#)):

Sure. Joshua, this is a question that comes up a lot, and it's a simple question, but it takes the form of either where is my case? Where is a case that I litigated or more generally, where is a specific case? I'm trying to a specific case, how do I do that as quickly as possible in Lex Machina? We're looking specifically at federal district court. And I think sometimes what people may not realize is, the case numbering system, those case numbers are the same in all 94 federal district courts. So if you just put the case number in, you might get up to 94 cases associated with that one case number. But if you put in the court, so I think you're going to use the example of the Apple Samsung case which was litigated in the Northern district of California. You put in the case number in the search box, and you filter to that court, you will find the one case in that court that has that case number, and that is the fastest, most efficient way to find a specific case in Lex Machina, all you need is the case number and to know which court the case was litigated in.

Joshua Harvey ([24:34](#)):

Well, I appreciate that David and Sherrill, I think we came up with 10 really good ways that our users and our customers are going to be able to use Lex Machina more strongly going forward. So I do think we have a little bit of time for a couple of questions. So let's see. Let me see if I can pull up our Q and A box here and see if any questions have come in. And actually, because I'm sharing, I'm not able to see that actually. David or Sherrill, are you able to see any of the questions that have come in?

David Friedman ([25:10](#)):

Yeah, I see a couple of questions. Do you want me to read the question?

Joshua Harvey ([25:16](#)):

Yeah, why don't you go ahead and read the questions? And answer?

David Friedman ([25:17](#)):

So one question was, if we don't subscribe to particular portions are we still going to see it on the screen?

Joshua Harvey ([25:25](#)):

If you don't subscribe to particular portions, you're still going to see on the screen? That's a good question. So you may see. In certain situations, you might see where something is kind of blocked off, so you would be able to see it in the results for you and be able to access it. It would be grayed out. And then there are some situations where, for instance, we recently released our remaining federal,

essentially, which has all the cases in paste, or even the ones that don't easily fit into our different practice area modules. And so you might actually see with some of those results in your case step, but they wouldn't be included the actual analytics and you wouldn't be able to access them if your organization does not subscribe.

David Friedman ([26:08](#)):

So a second question that I see, could you please [inaudible 00:26:12] of a search for P tab documents, for example, motion to amend with corresponding outcomes or expert declarations for say, a list of 50 IPR proceedings or by expert name. And then she said the deliverable would preferably be by a spreadsheet.

Joshua Harvey ([26:31](#)):

Okay. So there's a whole lot to unpack there, and I think that may be a question that we'll have to have maybe the customer success manager for that particular customer follow up more directly. But I will go into the administrative tab and show that we do have the P tab trials. We have analytics around P tab where you can run searches and see the analytics. And then that's both in the P-town trials. We have our trial flow with law firms, resolutions, grounds, and then you can search across the documents there as well.

Joshua Harvey ([27:06](#)):

So there were three or four questions there. Again, we'll have someone follow up with that particular question, but that's a great question.

Joshua Harvey ([27:15](#)):

Now I do see the questions. One other questions that we do have come in, we did a couple of different variations of keyword searches. And so one of the questions is about the syntax of our keyword searching and just where we can find more information about how to run some of these searches. And so if you're in Lex Machina and you click into your name here, we have this button, it takes you out to the help center. And we really do have a lot of great things in our help center. So we have things like our quick tips, where you can come in and see quick tips about how to do different types of searches. And then we also have our documentation. And so this is where you can see kind of explanations and definitions of the different practice areas, the different case tags. It talks about what's covered under damages or case resolutions. And then we do have our search syntax here as well. So it does kind of walk you through our bullion operators.

Joshua Harvey ([28:16](#)):

Also when you're actually running a search and you are in the search box there, let me just pull up an example here. When you're going to that keyword search box, there's a little button there that allows you to see the search syntax guide as well.

Joshua Harvey ([28:36](#)):

All right, well, we're at our 30 minutes. One of the goals of the webcast here really was to share the most common tips and tricks that we regularly discuss with our customers. And so we actually want to take this one step further and invite all of the customers on the webcast here to actually share your own tips and tricks, and we want to make it kind of fun.

Joshua Harvey ([28:57](#)):

So within the next couple of days, every customer that's on the phone here will get a up email from the customer success manager that is responsible for helping out with their organization. We'll send you a follow up email and we'll ask you if you have any tips and tricks that you'd like to share. If you have any that you think are unique or helpful, please feel free to share those tips and tricks. The customer success team will get together in a few days and collect those tips that we've gotten. And we're actually going to pick the two that we think are the most helpful and share the entire collection with the team, both the ones with the customers, both the 10 that we've covered today, as well as the ones that you all have submitted. And we're actually going to give a \$25 Amazon gift card to the two that we've chosen to be kind of the most unique and most helpful.

Joshua Harvey ([29:48](#)):

So I really appreciate everyone's participation. Sherrill, David, appreciate your time and all the insights that you shared today. As always, to everyone on the call, please don't hesitate to let us know if there's anything that we can help you with our legal analytics and Lex Machina, we're always here to help. All right, thanks so much everyone. Have a great day.