



## Legal Analytics Made Easy With Quick Tools

Have you ever received a new matter on a Friday night with no one to help you get an answer to your urgent questions? Join Rachel Ullman and Neil Magenheim as they presented Quick Tools, a set of unique analytic tools that deliver instant answers to your litigation questions. It's never been easier to leverage powerful Legal Analytics. Learn how you can get invaluable strategic insights with just a click of a button.

Some of the topics our speakers will cover:

- Compare the performance of up to 4 law firms side by side
- Compare up to 4 venues or judges side by side
- Compare the litigation posture of parties side by side
- Draft winning motions with Motions Kickstarter
- Get started on a new matter with Early Case Assessor

### Speakers:



Neil Magenheim  
Sales Director  
Lex Machina



Rachel Ullman  
Customer Success Manager  
Lex Machina

Neil Magenheim [\(00:00\)](#):

Hello everyone, and welcome to the Lex Machina Legal Analytics made easy with Quick Tools webcast. By way of introduction, Lex Machina is legal analytics. Our clients use Lex Machina to make more informed data-driven decisions to help them win.

Neil Magenheim [\(00:21\)](#):

You can see here on this next slide the law firms that use Lex Machina using our data to help them win, help them win business and help them optimize outcomes on behalf of their clients and on behalf of their firm. Some of the most recognizable corporate logos throughout the world use Lex Machina to select, evaluate, and benchmark their outside counsel and to make those more informed business strategy decisions to help them succeed.

Neil Magenheim [\(00:56\)](#):

My name is Neil Magenheim, and I am the Director of Client Relations here at Lex Machina, and I'm really excited to introduce you to my colleague and our guest speaker, Rachel Ullman. Rachel is a Customer Success Manager here at Lex Machina based out of Philadelphia and is a licensed attorney. Rachel loves helping her clients learn how to use Lex Machina and increase the use of legal analytics in their daily workflows to help them win business and win cases.

Neil Magenheim [\(01:27\)](#):

Rachel, welcome.

Rachel Ullman [\(01:30\)](#):

Thank you Neil. Happy to be here.

Neil Magenheim [\(01:32\)](#):

Great. Today we're going to be talking about Lex Machina's Quick Tools. To introduce the quick tool concept very quickly is Lex Machina Legal Analytics Quick Tools combine instant access to our analytical insights with the ultimate ease of use. Many of our quick tools have been developed based specifically on the most popular use cases, but also as far as specific feedback that we received from our customers over the years. Our unique tools leveraged Lex Machina's Legal Analytics platform and our underlying data.

Neil Magenheim [\(02:12\)](#):

What we're going to do now is go into a few of the more popular quick tools, and I'm going to introduce the first Quick Tool and then hand it over to Rachel to show us a couple of the use cases. The first Quick Tool we'll take a look at is called our Law Firms Comparator. From a high level, our Law Firms Comparator enables powerful side-by-side comparison of up to four law firms with instant display of the unique and proprietary Lex Machina case specific data. Rachel, over to you.

Rachel Ullman [\(02:46\)](#):

Thanks Neil. There are a couple of really excellent use cases for our Law Firm Comparator. The first is for corporate counsel. The Law Firm Comparator is going to allow you to select the best firm for your case. So for example, if I am corporate counsel and my company is getting sued over a securities issue, and it's

more complex and costly than what my team is able to use our resources for, what's the best way to go about finding a firm to represent us? If you're not using the Law Firm Comparator, you can rely on recommendations, firms you've employed in the past, even if they may not have worked on a securities issue for you before, or potentially spend hours or even days researching firms. With Lex Machina's Law Firm Comparator, you can get really on-point helpful information and analytics about law firms you're considering within seconds.

Rachel Ullman ([03:34](#)):

In this example, I just pulled the most active law firms representing clients in securities defense by cases filed over the last three years from Lex Machina's recently published Securities Litigation Report as a starting point. So depending on what's the most important thing to my company, I'll be able to quickly and efficiently see important information about firms that I am considering. You can take a look at the number of open cases that the firm has handling in securities, how many cases that firm has handled through termination when representing a defendant specifically, timing metrics so that you can properly assess how long and how expensive your case could potentially be, and how cases represented by these firms specifically for securities cases have been resolved, including damages.

Rachel Ullman ([04:22](#)):

Lex Machina's proprietary way of processing and displaying data is going to show you amazing insights really quickly. Our damages analysis is critical for this. It's a great representation to see how money has actually changed hands and the amount in a very easy to see snapshot view. At the end of the day, this is going to be what your client and firm likely cares most about.

Rachel Ullman ([04:43](#)):

The second major use case for our Law Firm Comparator is going to be for law firms. You'll be able to quickly see how you stack up against your major competition in the [inaudible 00:04:51]. You'll not only be able to see how you stack up against other law firms' biometrics, you'll be able to see some of your key differentiators and you'll be able to see what your potential client is seeing. And as Neil displayed earlier, a ton of corporations are using Lex Machina for their business needs so you'll be even more prepared going into your meeting, whether it's with a current client that you're looking to grow business with or a potential client, knowing that your client may have Lex Machina as well, so be even more prepared this way.

Neil Magenheim ([05:26](#)):

Nice job, Rachel. The next Quick Tool that we're going to take a look at is our Courts and Judges Comparator. So from a high level, our Courts and Judges Comparator enables our consumers to compare up to four federal district courts and judges to gain critical insights regarding those specific cases. Rachel, can you take us through a couple of examples here?

Rachel Ullman ([05:53](#)):

Definitely. There are a few ways to use this Quick Tool. The first use case is to compare different federal district courts. Often you're going to be able to select which federal court to file in. How helpful would it be to your case rather than having to rely only on anecdotal experience with certain courts to see objective data on any court you're considering, to make the best choice you can on where to file based on the legal analytics comparing each court? Super objective, super easy. You'll be able to see key metrics on one page, so it makes it very easy to digest the information.

Rachel Ullman ([06:26](#)):

The second major use case is to compare different federal judges. You can compare judges in different courts or in the same court, depending on your need. Comparing judges in different courts could be useful if you have frequently appeared in front of certain judges for similar matters, but are getting assigned to a judge in a court you haven't been to before for that matter. Do you need to adjust your strategy? Is your strategy okay? And what about your budget? The timing could be very different depending on what judge you're in front in a courtroom. This will help you manage your firm's expectations as well as your clients. If you're comparing judges in the same court, because you're filing in that court and you can be in front of any of these judges, you're going to be able to see it with just a few clicks, how these judges have ruled compared to each other. You'll be able to be better prepared for any of these judges assigned to your case.

Rachel Ullman ([07:13](#)):

Another cool feature, which is what I just ran, is that you can mix and match judges and courts to see how up to three judges at once compared to a court's overall analytics. You'll be better prepared for any judge you get assigned to in the court you're filing with.

Rachel Ullman ([07:28](#)):

Remember that there are no dead ends in Lex Machina. You're getting high level insights. So with a Lex Machina subscription, you'll be able to get a ton of relevant information to best prepare your case. You'll also be able to click on any hyperlink you see to learn more information and jumpstart your search even further.

Rachel Ullman ([07:46](#)):

So to show you how the Courts and Judges Comparator works let's just say, for example, that one of our clients wants to know where the best place to file for breach of contracts case for a contract issue in California. Our preliminary research tells us that the Central District of California has become a popular venue for this type of case. Knowing this, even though we can't control which judge we're going to actually be in front of, we want to see who are the judges that have a high likelihood that we could be in front of based on their volume of cases for contracts cases what their behavior is like. We'll be able to strategize properly depending on which judge we're going up against and be able to prepare regardless of who we're in front of.

Rachel Ullman ([08:26](#)):

There are a few metrics we want to look for here, and they'll all be displayed in the Courts and Judges Comparator. Regarding timing; if the client was seeking a permanent injunction, how long would that take in the court? And it can differ by judges also compared to the actual court itself. What about for summary judgment? And what about for trial? Does it differ for judges? Does it differ for the same court? For example, we see here, Judge Anderson has had less trials than some of the other judges, so we might have less likelihood of going to trial here compared to other judges.

Rachel Ullman ([09:00](#)):

And of course, importantly, how often does the claimant win? What type of damages are getting rewarded? And what about other remedies? That's obviously important in the contracts cases. As far as breach of contracts cases go, when do findings typically occur in the Central District of California, and

does it differ by judge? Remember that only Lex Machina has practice areas specific findings, so even if we needed something other than breach of contracts cases, we can get super specific here.

Rachel Ullman ([09:27](#)):

So think about how much more informed your advising is going to be on both your firms end, and your clients end, with just a touch of a button. It's invaluable for setting expectations and incredibly helpful for budgeting and for your time spent on the matter. You'll be able to see each judge's tendencies. Because anything can change. I'm sure many of you have been there, if a judge is reassigned, if a judge recuses themselves, if a different judge is assigned for some reason, and with Lex Machina's Legal Analytics, you'll be able to better prepare for any of these scenarios if you plan for them. And thankfully, it's not going to take you hours or days on end to get this critical information.

Rachel Ullman ([10:01](#)):

So remember with the Courts and Judges Comparator Quick Tool, we're taking Lex Machina's powerful analytics and bringing it into one chart to show you, and you can swiftly and effectively compare all of these metrics at once with this Quick Tool.

Neil Magenheim ([10:15](#)):

Great job, Rachel. Moving on to a next Quick Tool that we're going to highlight today during our time together, is our Patent Portfolio Evaluator. In essence, it does exactly what it suggests it's going to do. It gives our users the ability to assess the complete litigation history for an entire patent portfolio in one report. Rachel, you will take us through a couple of examples here?

Rachel Ullman ([10:46](#)):

Definitely. I also just want to share an anecdote as this report runs. One of my wonderful corporate clients, who's been a Lex Machina customer for years, had not taken a look at our quick tools in a while. They file a ton of patents as well, so this could be very valuable for them.

Rachel Ullman ([11:02](#)):

In a recent meeting, we just went over our Patent Portfolio Evaluator just to see how fast and easy it was to quickly pull information on a patent set rather than completing a ton of individual searches and get more information, more quickly than completing those individual searches. It's a really efficient way to complete a high level evaluation of patents. And the cool thing is you can put up to 1000 patents into the Patent Portfolio Evaluator at once.

Rachel Ullman ([11:29](#)):

A really solid use case for the Patent Portfolio Evaluator is if your law firm was working on a potential acquisition for your client of a company with one of the primary objectives behind the acquisition to acquire patents that this investible company is saying are allegedly worth \$8 million. On the surface, or even when you look at those individual patents, maybe that number and valuation makes sense.

Rachel Ullman ([11:54](#)):

The great news is that if you have Lex Machina, you can perform due diligence and complete a check with the Patent Portfolio Evaluator and run these patents through it. You'll be able to see if those patents may actually be worth that \$8 million that this company is saying, or maybe there are more

holes in the potential validity than what the company you're trying to acquire is saying. Maybe those patents are only worth \$6 million at the end of the day. But regardless of the valuation, you're going to be able to quickly glean this information that might otherwise take hours or days to retrieve and best serve your clients.

Rachel Ullman ([12:30](#)):

What you're seeing right here, you're seeing the patent numbers that we ran. You're seeing the title of these patents. And at a very high level on this overview page, you're seeing the cases that these patents are involved in in district court, PTAB and ITC, and district court findings, as well as damages.

Rachel Ullman ([12:45](#)):

Again, I've said this a few times during this webinar, but anything that you see hyperlinked, you can click on to get more information. So if you want to see what the damages were for the poorest codings there [inaudible 00:12:57] and use thereof ... that's a mouthful of a patent ... you can get more information by just clicking on that here. Likewise, if you want to get more information specifically on those district court cases, that these patents are involved in, PTAB trials, ITC investigations, damages, remedies, and findings, you'll be able to do that. And once again, you can get more information really quickly by just clicking on that. It's a great way to see at a high level what all of these patents are worth to your client, and if you're a corporation you can see at a high level what your patents are worth.

Neil Magenheim ([13:34](#)):

Excellent. Excellent. Excellent job, Rachel. Thank you for walking us through that. Moving on to the next Quick Tool. As I'm sitting here thinking, and speaking through this with you, the way that these quick tools are named, it's really clear what exactly it is you'd be able to do by accessing these various quick tools. The next one we're going to talk about is our Motion Kickstarter. Our Motion Kickstarter makes it easy to draft winning motions by helping our consumers compare the arguments and motion styles that have been successful before a specific judge, for a specific case. Are you able to share a couple of use cases from the field on that, Rachel?

Rachel Ullman ([14:16](#)):

Definitely. This is one that most of my clients just love because it's so easy to use. It's so simple and it's super helpful.

Rachel Ullman ([14:24](#)):

When appearing in front of any court, whether it's one you're familiar with, or it's a completely new judge or venue, knowing the past behavior of any judge can be invaluable for your preparation and strategy. Motion Kickstarter has two great use cases to save you time and produce a potentially better outcome, or at the very least ensure that what you were going to do is on the right track if you were already on the right track with this judge.

Rachel Ullman ([14:48](#)):

The first is to allow you to look at the 10 most recently granted and 10 most recently denied examples of motions in that court to help you craft your motions, depending on which side of the fence you're on. This could also provide valuable insight as to whether you need to adjust your strategy. If you're trying to get a motion granted, but a recent case with similar facts and strategy was recently denied, how will you differentiate yours to get a more favorable outcome for you and your clients? It's better to know

now than to know after you submitted that motion. On the other side of it, if you're taking a look at the winning motion on either side, how can you capitalize on knowing that this judge was receptive to those types of arguments to save you time and give you a better chance for success for your case?

Rachel Ullman ([15:33](#)):

The second great thing about the Motion Kickstarter Quick Tool is that you're not only seeing these 10 granted and denied examples, but the key here is that you're seeing the most recent ones. Recency is so important when crafting your strategy. Judges have a tendency to not want to overrule or contradict themselves, particularly so for recent rulings for probably obvious reasons at this point in your practice.

Rachel Ullman ([16:01](#)):

Here we're taking a look at Judge Pannell Jr.'s recent summary judgment motion for employment cases in the Northern District of Georgia. So if you're going to be filing an employment case there, this is going to be a great place to look to make sure that you are doing the right thing, saving yourself time, saving yourself money. What you'll notice here is that we have different times to order. It's going to be in the bottom right-hand corner for any of these 10 motions on either side of it. So it could be worth to take a look to see is Judge Pannell consistent in how quick his time to orders are, or is he not?

Rachel Ullman ([16:40](#)):

If you want to take a look at the actual docket, this is another great use of Lex Machina in general. You can get details for any of these cases by pulling dockets. And remember if you're a Lex Machina's subscriber, this does not cost you anything. You can pull these dockets from Lex Machina instead of PACER at no additional cost to your firm or to your subscription, and you can ultimately save on your PACER bill.

Rachel Ullman ([17:07](#)):

I just want to show you, I have it pulled up already, but if I wanted to actually pull the motion for the summary judgment order, I can just click here, take a look at it, and the motion chain is right here in front of me. So super easy; just one click. And if I clicked on that view documents link, you're going to be able to see what the actual summary judgment motion is, and you can go through the language yourself. It'll really save you time. It'll allow you to hone in your strategy and your language in your motions to be the most successful for your clients.

Neil Magenheim ([17:43](#)):

Great job, Rachel. Moving on to our fifth and final Quick Tool. It was so for us to select the five that we're going to highlight during our time together, because they're all so unique and so amazing. We're going to take it home here and then get to some Q&As. We're going to take it home with our Early Case Assessor. The Early Case Assessor allows both our corporate and law firms subscribers to quickly assess the threat or risk posed by a new case by simply putting in three pieces of information; plaintiff, the plaintiff's law firm and the case type.

Neil Magenheim ([18:21](#)):

Rachel, I'll hand it back to you so you can take us through a couple of use cases that you're learning and working within the field.

Rachel Ullman ([18:28](#)):

Thanks Neil. A primary use for the Early Case Assessor if you're a law firm is that you'll be able to see if your opponent has experience in this venue, what you're up against and any recent case filings related to that area of law. While personal anecdotal experience is obviously fantastic and invaluable, if you happen to have faced a specific attorney or a law firm before, or even frequently, your preparation is going to be that much more amplified with the Early Case Assessor.

Rachel Ullman ([18:57](#)):

The second use case for Early Case Assessor is if you're involved in litigation as a party, you can see which law firms have experience for your matter of interest to better assess how you'd like your case to be handled and which firm you'd like handling it. Remember that you can go into further case analytics from the perspective of any of these searches.

Rachel Ullman ([19:18](#)):

Right now we're looking at a party getting sued for an employment issue. We can get a ton of valuable information here very quickly. You can see how often this plaintiff and law firm reached trial. You can see what the damages are. You'll be able to see recently filed cases from the plaintiff's side that this firm is involved in for this area of law. You're really getting a ton of rich information. What's great about our Early Case Assessor is that you won't be walking into a case blind if your client gets sued. If you're debating whether to take a case, this information can help you decide if it's actually worth yours and your firm's time. Now on the flip side, if your company is getting sued, you'll be able to quickly find resources, which you can see right here; potential resources. Very easy. You're going to be able to see which firms have frequently opposed the law firm involved in your suit. You're going to be able to see which individual attorneys have opposed the plaintiff before.

Rachel Ullman ([20:21](#)):

So not only is this information on one page, but you're going to be able to dive deeper into any of these snapshots by clicking on this hyperlink information. So if I want to see specifically what this firm has been up against when against this party, I just click on that. Super easy. As far as the most recently filed employment cases, you can get more information this way. Remember, all of this is included in your Lex Machina subscription. So tons of information. It's a really great way to see all of this just at a glance. It's going to save you time. It's going to save you a headache and hopefully it'll make your day a little bit easier and your clients a bit happier.

Neil Magenheim ([21:06](#)):

Nice job. Rachel, we have started to get a flurry of questions in here. I'm going to try to work through these questions. And if we aren't able to get to your specific question, someone on our team will certainly reach out to you to make sure your question is answered.

Neil Magenheim ([21:24](#)):

First question, I think is a good one for you, Rachel, how does Lex Machina come up with quick tools? How do they get developed?

Rachel Ullman ([21:34](#)):

That's a great question. Honestly, that was one of the questions I have when I started here. The quick tools have been one of my favorite features of Lex Machina since I started. It's not always utilized as thoroughly as I want all of my accounts to utilize them because it's so valuable, so I had that question too.

Rachel Ullman ([21:54](#)):

Mainly we get some of our quick tools from our clients' suggestions. It's that simple. One of the wonderful things about working at Lex Machina is how responsive our team is as a whole, from top to bottom, as an organization for our clients and our client's needs. Some of our best ideas have come from recommendations and suggestions from our clients. And many others have come internally, including from our amazing product team, who is the brainchild behind all of this and building all of these quick tools.

Rachel Ullman ([22:23](#)):

What I would encourage you to do if you're a current Lex Machina client, or even if you're not and just have a great idea, please share it with us. You can contact people like me, your CSM, that's your customer success manager. So if you're current clients on here, reach out to me if you have any ideas. You can put it in the chat box if you'd like, or you can submit those questions through the support tool within Lex Machina or email support at [lexmachina.com](mailto:lexmachina.com) to send in your suggestions. If you have a frequent search that you're doing, we might be able to incorporate that in the future as a product development.

Neil Magenheim ([23:02](#)):

All right. Great. Next question. Are the use cases that you described the only way to use these quick tools?

Rachel Ullman ([23:08](#)):

That's a great question, too. It not. One of the great things about not only just the quick tools, but Lex Machina in general, is that myself and some of my colleagues are always hearing about different ways that clients have utilized our quick tools.

Rachel Ullman ([23:26](#)):

Just as a quick example at a high level, one of my colleagues the other day was telling me that somebody in business development data at a major firm was looking at our Patent Portfolio Evaluator from a totally different way than what I had ever looked at it as. It was more high-level litigation for a specific firm. It was just a really unique way to run something that I had not thought of. But the most important thing was the litigation risk in company involved patents to just get an understanding of where litigations involving that patent lay. I hadn't thought about it that way. It's just a great way to just show that there are tons of uses beyond the general use cases that I've shared today. So feel free to play around with it.

Rachel Ullman ([24:14](#)):

Another great thing about the Lex Machina's platform in general is you can run as many searches as you want. So if you're not sure if a use case that you have in mind falls within our quick tools or anything

else, you can still run it to see if you're getting the data that you need, and maybe it is a great way to use it in the future. Please share it with us if you do have a cool use case that maybe we haven't shared with you before.

Neil Magenheim ([24:40](#)):

Great. Maybe if you have time for just a couple more questions here, Rachel, if you wouldn't mind.

Rachel Ullman ([24:44](#)):

Sure.

Neil Magenheim ([24:45](#)):

Viewing the docket and documents from the docket regarding the Motion Kickstarter segment, those are all included in our firm's access to Lex Machina or are there additional costs that are billed to us for using?

Rachel Ullman ([25:00](#)):

That's a great question. It is all included. What I want to add, I don't know if this was easy to see when I was displaying everything, not only are those included, but some of those dockets will get downloaded ahead of time. But if you ever see the word "fetch", sometimes I get this question during trainings, if you ever see the word "fetch" button next to any document that you want to pull, that does not mean that your firm or your corporation is going to incur any additional charges beyond your typical Lex Machina subscription. All that means is that we're going to pull from the original source at the time you click fetch. So it might take a minute or two to download, but all of that is included in your Lex Machina subscription. I definitely encourage you to take advantage of that as part of your subscription.

Neil Magenheim ([25:46](#)):

That's great. There are a few other questions that we haven't had time to get to. I do want to be considerate of everyone's time. I do thank our audience for your thoughtful questions and your time and participation on today's webcast. I also want to thank Rachel for your participation and your expertise and your willingness to share with the audience. You did a fantastic job. Thank you. If anyone would like to learn more, here's my contact information on the screen. Feel free to send me an email. We'll be able to point you in the right direction.

Neil Magenheim ([26:21](#)):

Again, thank you everyone for attending our Quick Tools webcast. This now does conclude the webcast and our programming for today. Thank you.