

## Case Study— Litigation Services

### Keesal Young & Logan

#### Overview

**Location:** Long Beach, Calif. (with additional offices in San Francisco, Seattle, Anchorage and Hong Kong)

**Industry:** Legal services

**Customer Profile:** Since its founding more than 40 years ago, Keesal Young & Logan (KY&L) has built a national reputation with innovative work in financial services, admiralty/maritime, environmental, employment and complex business litigation. The firm maintains offices in five cities, serving the business and civil litigation needs of clients throughout the Western United States and Pacific Rim.

**Business Situation:** KY&L is renowned for its exceptional trial record over the past four decades. Like many law firms, KY&L relied on a very manual process for managing litigation documents throughout its history. As the cost-benefit ratio associated with the acquisition of litigation support technologies improved, however, the firm decided to step up and explore the feasibility of acquiring an enterprise software tool that would benefit all of its clients.

**Solution:** One of KY&L's paralegals was familiar with a product from LexisNexis® called CaseMap®, having used the software for building document databases. The litigation team saw far greater potential in CaseMap as a fact-and issue-management software platform, so they requested a demonstration of the product's full capabilities. They immediately realized the value of the software and acquired additional licenses for the department.

#### Benefits:

- Provides a complete roadmap for a case, which gives lawyers peace of mind that all of the case facts and documents are at their fingertips
- Saves time by loading all case documents directly into CaseMap database and retrieving in moments whenever needed
- Provides better client service due to ability to pull up pertinent documents and facts in cases any time a client asks a question or asks for an update
- Allows litigators to isolate specific documents that pertain to particular case issues and themes, significantly improving preparation for trial or mediation

#### Product Summary:

Litigation Services

- CaseMap® Suite (CaseMap, TimeMap®, TextMap® and NoteMap®)

## Keesal Young & Logan Relies on CaseMap® to Organize a Large Volume of Case Documents and Access Key Information at a Moment's Notice

Since its founding more than 40 years ago, Keesal Young & Logan (KY&L) has built a national reputation with innovative work in financial services, admiralty/maritime, environmental, employment and complex business litigation.

The firm's reputation as formidable litigators and effective corporate legal practitioners is built on thorough preparation, creative strategic thinking and strong courtroom advocacy.

KY&L's expertise is delivered to clients through multiple areas of practice: Appellate; Bankruptcy; Business Litigation; Class Actions; Consumer and Business Lending Litigation; Corporate & Real Estate; Employment; Environmental; Health Care; Insurance; Intellectual Property; Maritime; Mortgage Banking Litigation; Products Liability; Professional Liability; Public Law; Securities; Unfair Business Practices; and White Collar Criminal Defense.

KY&L maintains offices in five cities, serving the business and civil litigation needs of clients throughout the Western United States and Pacific Rim.

### Situation

Over the past four decades, KY&L has become renowned for its exceptional trial record on behalf of clients. Like most law firms, KY&L relied on a very manual process for managing litigation documents throughout its history.

"From time to time, we would have internal discussions regarding whether a specific case was large enough or complex enough to merit the expense of purchasing a litigation software product to help automate the management of documents," said Justin Hectus, director of information at KY&L. "But particularly for smaller matters, the answer was often 'No'—it just didn't make sense from a cost standpoint and the learning curve for new technology was steep. Moreover, we already had a proven record of litigation success by using the traditional approach, so there were big barriers to making a major investment in software."

As the cost-benefit ratio associated with acquiring litigation support technologies improved, however, the firm began to consider a game-changing model for litigation management.

*“The biggest benefit from CaseMap is that it provides me with a complete roadmap for a case, which gives me great peace of mind when I’m preparing to litigate a case. CaseMap is an extraordinary tool for case organization.”*

—Stacey Garrett, partner  
Keesal Young & Logan

“There was a real movement by a group of partners and litigation support professionals to pursue a firmwide initiative that would incorporate leading-edge technology into our practice at every level. Rather than weighing the cost benefit of software and training on a particular matter, they laid out a vision for ensuring that all professionals were highly trained on the most sophisticated tools available and that those tools could be utilized for the benefit of all of our clients, no matter the size of the case,” said Hectus.

The entire partnership saw the potential of this approach and stepped up in a big way to acquire an enterprise software tool and to promote comprehensive training for the benefit of all the firm’s clients.

### **Solution**

“I started out by asking around the office for any ideas and it turned out that one of our paralegals was familiar with a product from LexisNexis® called CaseMap®,” said Stacey Garrett, a partner at KY&L who has practiced at the firm since 1991. “She had used the software for building a few document databases and thought we might want to take a look.”

As Garrett explored the product, she began to see what she believed was far greater potential in CaseMap as a comprehensive fact-and issue-management software platform. She invited other members of the firm to give her their views and they readily agreed, so she reached out to LexisNexis and requested a demonstration of the product’s full capabilities.

The award-winning CaseMap software helps litigation professionals identify and link facts, legal issues and parties involved in each case, and store them in specialized relational spreadsheets for ready access and analysis throughout the litigation. The product allows them to see the “big picture” in a case while revealing vital links in case information that might otherwise go undiscovered. By quickly seeing how facts and other information affect the key issues in a case, CaseMap is a valuable tool for evaluating a case’s strengths and weaknesses in considering settlement or trial.

“We immediately realized the value of this software and felt it was an excellent tool for helping our firm provide clients with the best and most efficient service possible,” she said. “My partners were extremely supportive of my recommendation to acquire additional licenses for our entire litigation department and our IT team worked closely with me to make that happen.”

*“CaseMap gives me the ability to manage the massive amounts of documents that are now common in commercial litigation matters. But to have the key document I need at my fingertips in a moment’s notice ... this is a tremendous advantage for me as a litigator and therefore a great benefit to the firm’s clients.”*

—Stacey Garrett, partner  
Keesal Young & Logan

According to Garrett, the implementation of CaseMap throughout the firm was very smooth. To get things started, LexisNexis sent a trainer to KY&L, who taught the litigation team the basics of how to use the product. The firm also hired Bob Meyers, an independent consultant and certified CaseMap distributor, to consult with them on how to make sure they maximized the use of the product in their internal workflow. Finally, CaseMap training was incorporated into KY&L’s ILTA award-winning learning program, which led to a broad base of CaseMap Proficiency and CaseMap Certified Administrator certification for a number of the firm’s litigation support professionals.

### Results

With more than two years of heavy use of CaseMap software now under their belts, the litigation professionals at KY&L have achieved some important benefits from the software platform.

“The biggest benefit from CaseMap is that it provides me with a complete roadmap for a case, which gives me great peace of mind when I’m preparing to litigate a case,” said Garrett. “CaseMap is an extraordinary tool for case organization and gives me a detailed roadmap for even the most complex litigation matters I manage for clients.”

Second, the KY&L team has experienced significant time savings from the efficiencies realized by loading all case documents directly into the CaseMap database and then retrieving them in a matter of moments whenever needed. This is a dramatic improvement over the firm’s historically manual process for organizing case documents.

“The culture of our firm is such that we will embrace any tool that helps us better serve our clients in a cost-efficient way, and another key benefit from using CaseMap is that we’re able to provide better client service in many ways,” explains Garrett. “One common example is that we’re able to pull up relevant documents and facts in a case anytime a client asks a question or asks for an update from us. This responsiveness is the kind of thing that we believe our clients deserve and appreciate.”

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Finally, Garrett has enjoyed the way that CaseMap allows her to isolate specific documents that pertain to particular case issues and themes, significantly improving her preparations for a deposition, mediation or trial. By zeroing in on the most important documents and exhibits, making her notes about how she wants to approach certain issues and then tagging those items to correspond with specific case themes, Garrett is able to better organize all of the disparate documents and facts in a case and be better prepared for litigating the case.

“CaseMap gives me the ability to manage the massive amounts of documents that are now common in commercial litigation matters, but to have the key document I need at my fingertips in a moment’s notice,” said Garrett. “This is a tremendous advantage for me as a litigator and therefore a great benefit to the firm’s clients.”

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## About LexisNexis

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