

WEST CASE NOTEBOOK CASE STUDY

Goodell, DeVries, Leech & Dann

WEST CASE NOTEBOOK INCREASES FIRM EFFICIENCY
IN A TOUGH ECONOMY

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Goodell, DeVries, Leech & Dann, LLP is a 45 attorney law firm in Baltimore, Maryland, specializing in medical malpractice and product liability defense. As clients are watching dollars more carefully in a difficult economy, Goodell DeVries continues to search for opportunities to improve efficiency and effectiveness throughout their firm. As part of that effort, they have used LiveNote™ for transcript management for a number of years. Then, an attorney saw West Case Notebook® at a conference and realized it is much more than LiveNote and could multiply the benefits to the firm exponentially.

First impressions were powerful. *"I was in a meeting with an attorney," said Karen Reiter, the firm's trainer, "and I was showing him Case Notebook. He wanted to use it for trial to quickly call up exhibits. During the meeting he said, 'Oh, I need to look up information on suctioning that's in this one transcript. I'm going to go back to my office and see if I can find that transcript.' But I had his case on Case Notebook, so I just did a search on what he was looking for, and two seconds later it pulled up all the lines with it. And he said, 'Oh, that's exactly what I'm looking for!'"*

Associates, partners, and paralegals are all finding Case Notebook to be a transformative tool that enables them to spend more time focusing on their arguments and strategies, and less time looking for things.

EASY TO START WITH CASE NOTEBOOK

Case Notebook is being rolled out slowly, to learn the best ways of using and integrating Case Notebook into the firm's operations. Two to three attorneys per week are requesting Case Notebook training from Ms. Reiter, and the paralegals are also looking for it because they are hearing good reports from their co-workers. The great thing, according to Ms. Reiter, is that Case Notebook is easy to teach and use.

According to her colleague Kizzy Bivins, who is the first paralegal to use Case Notebook at Goodell:

"West Case Notebook is user-friendly. I'm not really computer savvy and if I can do it, anybody can do it."

GETTING TO THE HEART OF THE MATTER – FASTER

The Partner Perspective: Trial Notebook at your Fingertips

At its core, Case Notebook streamlines management and access to key case information, eliminating the need to haul bankers' boxes and binders all over the place. Malcolm Brisker is a partner with Goodell DeVries. Since Mr. Brisker started using Case Notebook, it has become an integral tool he relies on:

"I'm using my computer and Case Notebook because a lot of times you're going to have to cross-examine a witness based on what another witness may have said in the case. Or you need a document to refer to. You can do all that with Case Notebook because it gives you instant access. So yeah, it's my trial notebook for lack of a better term."

In addition to having faster, more convenient access to the information he needs, Mr. Brisker also notes that Case Notebook enables him to cut out and analyze key information in a more efficient manner:

"Before Case Notebook, I did more review of transcripts in paper or in PDF but I wasn't able to annotate them as efficiently... Unless you just want a deposition that's all written on, the issue is how do you do it so that you maintain the integrity of the transcript but be able to find what you need? And so I find that's one of the great advantages. When you're reading a deposition for the first time, you can just start annotating by creating issues and notes and things like that and you don't have to create a separate abstract or summary because you can use Case Notebook to do that."

The Paralegal Perspective: Recycling Time

When it's time to create a summary or report, Ms. Bivins notes that Case Notebook enables her to deliver the requested information in a fraction of the time:

"Sometimes attorneys want to know about specific issues and this allows me to do a report. I put in that issue and it will find everything dealing with that issue and print out a report. So again, that's hours of my time that are being saved."

"In the old way of doing things, I would actually have to go through each transcript and do a summary of the depositions where a transcript, let's say would be 100 pages, I would have to get that transcript down to 10 pages and then from there, try to come up with issues, the important issues. Whereas now, it's maybe taking me a half an hour to do a report by just typing in key words that I'm looking for."

It is not an understatement to say that Case Notebook is changing her life. She uses it every day, and really can't imagine going back to paper.

"Doing it the old way, I would work late nights and I would be here on the weekends. Although my billables would be high, I would rather save that time and pick up another project, or be with my family at night, than go back to the old way."

MULTIPLYING PRODUCTIVITY

The Partner Perspective: Enhanced Collaboration

As a partner, Mr. Brisker also sees big improvements in his litigation teams when using Case Notebook, as it is now much easier for the partners' logic and thought processes to be followed by other team members:

"Usually, on the cases I use Case Notebook for, I'm the lead attorney. When I'm reading through a transcript for an associate who's writing a motion, I can say, 'Look, I've already highlighted everything I think you need to put in the motion. So go into Case Notebook, pull that stuff out, and then put it into the motion.' Because of the way it's set up, the key team members can see your annotations and can follow the logic of whoever's setting up the issues. Then they can use that to annotate things and complete their motion."

The big reason why this collaboration works so well is that the issues are applied across all the documents, including research, exhibits, and transcripts.

"For example, I actually set up an issue called 'testimony for motion for summary judgment' and then I just tagged everything with that. And then, if there's something specific I wanted to say that wasn't really in the issue, I would use the note feature for that. And you can run reports that categorize your issues and your notes so that the person who wants to see it without reading through the transcript can do that and just run the report."

The Paralegal Perspective: Getting Off of the Floor

For Ms. Bivins, Case Notebook has literally changed the way she does her work, and according to her, it is a welcome relief:

"Like most litigation firms, we have tons of binders and this software allows us to take our most important documents and have them in one place and searchable. So it makes it very easy and we don't have to get on floors or open up tons of binders to get this information and have to read stuff word by word. With paper, it's just sometimes better to spread out on the floor than work through stacks of papers and binders."

But with Case Notebook, the days of spreading out on the floor of her office to conduct a search are over.

"Case Notebook cuts the time that I spend doing my research. It has transcripts and exhibits linked together, and again, it's searchable. It can cut hours because I'm not actually flipping through pages looking for stuff. Or going to a word index and then having to go find several pages that have that word referenced. I don't need everything spread out on the floor where I can see it all anymore. You can click on the word and it gives you the pages and you just click on that page and it takes you right there. So, we're talking about hours that I'm saving on any given search."

THE ULTIMATE BENEFIT: TIME AND MONEY

When a firm like Goodell DeVries has the best of the best lawyers and paralegals, a tool like Case Notebook helps the firm maximize their talents. The mundane but necessary tasks are automated, so that attorneys and paralegals can concentrate on what they do best. Ultimately, it saves time and money. As Mr. Brisker noted:

"I think it saves time because you're able to annotate transcripts and get to things very quickly and sort of organize your case in such a way that you can organize documents, pleadings, and transcripts and get ready for trial and have that all in one place. It also saves money because instead of having people prepare deposition abstracts, which is a whole separate document, you can use Case Notebook to perform that function by using the issue codes and annotations. It makes your staff far more efficient."



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