



## CASE NOTEBOOK PROVIDES COMPETITIVE ADVANTAGE TO LITIGATION FIRM

In 2005, after many years with one of the largest law firms in Nashville, Bill Leader and his three partners set out to build a premier litigation practice. Leader's practice—medical malpractice and personal injury litigation—requires banker's boxes full of documentation, depositions, pleadings, exhibits, and research. Paralegals, administrative assistants, and associates spend a lot of time sorting, indexing, and searching those documents, even though many documents are scanned and stored in an electronic document storage system.

Leader knew that all the staff time kept expenses high. "We've got what I consider to be the best people in this city working at this law firm, and we pay them top wages. But they're very expensive and so if we can make our people more productive and not do labor intensive things, and if we can rely on technology, we're that much better off."

### TRYING NEW TOOLS

As a result, Bill Leader was very interested when his local West Law Firm Consultant suggested he look at West LiveNote a couple of years ago. LiveNote is a productivity tool for depositions. Leader tried it out in his firm, and it worked well. LiveNote enabled him to collaborate with his office during a deposition that was three hundred miles away. "I was up there alone, the only lawyer. But my associate was watching the deposition from the office. He had full access to all the documents and could help me and send me messages over LiveNote that only I could see—things like 'ask this question, refer to this document.' So we got a great deal of efficiency. He was back here in Nashville every night and every day and I was up there, but it was like he was sitting next to me... LiveNote impressed me."

Recently, when the same West rep suggested that Leader take a look at Case Notebook, West's newest productivity tool, Leader and his firm jumped at the chance. They needed a way to make their staff more productive, cut costs, make case documents portable, and improve the ease and efficiency of the tools they were using.

### THE INITIAL COMPARISON

"The three partners and I have been practicing law for twenty years or more. We've been using this older product and we just weren't real happy with it. It wasn't doing what we needed it to do. It was expensive—the licenses were just exorbitant. You had to pay a license fee for the server, for the network, and for every laptop. It was just



prohibitively expensive. And training for it is just out of the question. We had to go to a third-party vendor to get training on it, and it's just very cumbersome, very difficult to use.”

Their early experience with Case Notebook was completely different. Taylor, an associate at the firm, said he didn't need much training. “Case Notebook is so intuitive. Within an hour of the installation, we figured out how to do everything. I mean, it just makes sense....”

Leader appreciated the way his staff took to the tool. But he also found the business proposition far more compelling. “With Case Notebook, it's one integrated package. It's on our server, it's on our laptops. It's all under one license. We get billed by Westlaw for it. We don't have to really pay a license fee. We just pay a user fee, and it is much cheaper, much less than the older tool, and gives ten times the bang for the buck. So in that respect, there's just no comparison. Case Notebook is just so far ahead, not only on what we can do with it, but the cost. And West has stood behind it....”

## INSTALLATION

One example of West's support came during installation. West technical support worked with Leader's IT people to create a smooth installation for his firm—all as part of the package. “The West technical people spoke directly with our IT vendor and worked with them on setting it up on the server, getting it implemented fully on the network, getting the passwords automated, and getting it on everybody's laptop.... My IT people, who I've worked with and now rely on greatly, called me back, several of them did, and said, ‘this install has been wonderful. It has been so easy working with West.’”

A small firm cannot afford any problems with implementation, and Leader's experience speaks for itself. “When we first tried it, when we first started to use it, it worked perfectly. There were no glitches at all.”

## EARLY USE

Some of the younger associates learned Case Notebook's intuitive interface on their own. However, Leader and the rest of his team took advantage of West's free training program that got them up and running within an hour and a half. “West's trainer did an hour and a half training two days before Christmas day, on the 23rd of December. We did a WebEx, had a conference call, it was wonderful. It was just like he was right here. It's easy to use to start with, but he took us through the paces, he answered people's questions, and he's still available; anybody can call him up.”



Just as customers always have access to training for Westlaw, trainers are always available on Case Notebook, and there is no additional charge.

According to Leader, his paralegal of twenty years is also an advocate, and she finds Case Notebook much easier to use.

## SIX MONTHS LATER—THE ADVANTAGES OF CASE NOTEBOOK

Six months later, Leader is just as pleased with the value of Case Notebook as he was at the beginning. He says that Case Notebook serves the needs of his firm better than their previous tool. “It gives us a real advantage.”

### **Better Value**

First, there are substantial cost savings. All training and installation support come along with the Case Notebook subscription. There are no third-party training fees to pay and no concerns about the ability of the vendor to train new users. Case Notebook is very intuitive. The trainers are included in the package, and they carry with them the credibility and expertise of West.

### **Increased Productivity**

Second, Leader said: “It just makes everything we do for a case easier.” As a result, Leader and his team have more time to focus on legal issues, hone arguments, and create attorney work products, with less time spent chasing information to support those arguments.

For example, a huge value lies in Case Notebook’s search function. Taylor said “searchability and the organization across documents, pleadings, discovery” is key. You can search on text or phrases and “get a hit for every document, everywhere in the discovery, everywhere in the transcript where that issue is addressed. It has saved me all the time I would have needed to read all that stuff and find it for myself.”

### **Improved Effectiveness**

Third, the issues and annotation capabilities enable Leader’s team to organize their information and cases. “As lawyers at the front end of the case,” Taylor explained, “you can identify the basic things you’re going to have to prove. Having the issue tabs at the front end of a case, you can make your issue tabs of those things that you know are going to be important. Then, as you go through the case, you can start marking them up



with those issues in mind. You can create an issue as ‘breach in the standard of care’ or ‘causation.’” Then, Taylor explained that you can simply create a report based on the issue, and it is ready to go into whatever work product you are working on.

Taylor indicated that this was a huge advantage. The alternative approach, he said, was “You get a transcript back, you read it, and you don’t make those kinds of notes. Well, down the road, if you’ve got a brief or something that you’ve got to write, you’re going to have to go back and find that testimony again. Case Notebook helps us stay on point when we’re looking at testimony or looking for specific issues. It allows you to mark them in a global way, across multiple transcripts so that down the road, when you need to pull all the testimony together, you’ve already done the work for it.”

Leader added: “Our cases tend to be very fact intensive. You want to arrange those facts and be able to find them and locate them... You may want to locate an exhibit, reference, or citation that may be in a deposition without having to dig through a thousand documents. And literally, you could have to dig through more than that!... So you can do that with Case Notebook very easily.”

Leader and his associates could hardly be more satisfied with the product. “Case Notebook... is great, and I feel that we are at an advantage because we have it. We’ve got a definite advantage over any firm that doesn’t have it.”