

# Ropes & Gray Deploys Lexis® Search Advantage to Better Leverage Firm's Internal Work Product

## About Lexis Search Advantage

Lexis Search Advantage is a knowledge manage solution that enriches and simplifies the legal research workflow by enabling legal professionals to search and vet their firm's internal documents easier, and then validate and extend their research to the extensive portfolio of LexisNexis® legal research tools and resources—such as the Lexis® and Lexis+™ services and *Shepard's*® Citations, as well as the open web.

**Lexis® Search Advantage | Transactional** Powered by *Intelligize*® allows users to access the universe of third-party agreements by searching across both internal documents and agreements filed with the SEC. The advanced algorithms of the *Intelligize* service enable the indexing engines to classify internal documents and enrich them with advanced metadata that supports even the most complex conceptual searching.

[LexisNexis.com/LexisSearchAdvantage](https://LexisNexis.com/LexisSearchAdvantage)

## Situation

Ropes & Gray LLP serves clients through a global network of offices in the world's major centers of business, finance, technology and government. Across 17 time zones, more than 1,300 attorneys based in the United States, Europe and Asia collaborate to provide clients with high-quality, round-the-clock service that has made Ropes & Gray one of the world's premier law firms. Ropes & Gray professionals have a deep reservoir of legal knowledge and experience on a wide range of issues, which they bring to bear to solve business problems for clients.

"Ropes & Gray lawyers generate vast amounts of valuable work product reflecting creative thinking, legal expertise and deep industry experience," said Patrick Diaz, chief of legal knowledge management at Ropes & Gray. "Over the years, as we have grown in numbers and expanded our geographic footprint, we have felt a need for a tool that would give us a better way to find internal work product so it could be better leveraged to benefit our clients. By identifying our best and most relevant resources, we can provide better legal service more efficiently."

The corporate practice groups at Ropes & Gray were also looking for a way to maximize the value they could realize from *Intelligize*, a leading analytics solution enabling legal professionals to efficiently mine data and insights from SEC filings and related exhibits containing M&A contracts, transactional agreements and corporate governance documents. Access to relevant precedent documents enables transactional lawyers to identify market standards and draft and negotiate documents in an efficient manner.

“Intelligize is a go-to resource for our attorneys, and, as with all our resources, we explore and evaluate ways to seamlessly integrate these tools into our attorney’s workflow wherever possible,” said Stephanie Godley, senior manager of knowledge management & library services at Ropes & Gray. This has included practice group—specific training on how to utilize Intelligize to address regularly recurring questions.

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—Stephanie Godley, senior manager of knowledge management & library services at Ropes & Gray

Meanwhile, Diaz and Godley learned that LexisNexis was in the process of acquiring Intelligize, Inc. The LexisNexis vision was to combine the Intelligize product with the Lexis Search Advantage platform to offer law firms a better tool to manage and leverage their transactional documents. LexisNexis invited the Ropes & Gray team to participate in the development of this new product and help shape its features and capabilities.

The result was Lexis® Search Advantage | Transactional Powered by Intelligize®, an application created specifically for transactional lawyers of various disciplines.

## **Solution**

Lexis Search Advantage is a flexible knowledge management solution that integrates with a law firm’s existing document management architecture. The product allows users to apply the well-renowned search tools that LexisNexis and Intelligize apply to SEC filings to the firm’s internal document collections within that familiar environment and user interface. The software resides behind the law firm firewall, so nothing ever leaves the firm’s IT infrastructure, and it facilitates powerful and precise search across the firm’s internal document management system. Attorneys can search their own firm’s internal documents using a combination of fields and metadata from the firm’s document management system, Lexis Search Advantage and Intelligize.

“Our lawyers were impressed by the technology and how it applied the proven LexisNexis and Intelligize search logic against our internal work product,” said Godley. “We concluded this was the solution we were seeking to better leverage the internal knowledge that resides within the vast store of documents in our document management system.”

Ropes & Gray jumped at the opportunity to join in this effort by sharing product ideas with the LexisNexis development team as this solution was being built, according to Godley. By providing practical, practice-based suggestions, the firm’s professionals were able to help LexisNexis fashion a tool with the look, feel and functionality that would help their lawyers address client needs.

## **Results**

Ropes & Gray has implemented an ongoing process to educate its transactional lawyers on the availability of the Lexis Search Advantage solution. The Research and Knowledge Management team sends out periodic emails about the value of the product with specific use cases and search examples, conducts presentations to corporate practice groups to illustrate the benefits of the solution, and secures buy-in from the heads of practice groups to encourage them to push the use of Lexis Search Advantage. As a result of these efforts, the firm has seen a steady rise in the adoption of the software each quarter.

There are four principal benefits from the use of Lexis Search Advantage that Diaz and Godley identified.

### 1 Excellent technology

“The ability to do advanced LexisNexis and Intelligize searches on our own internal documents is very powerful,” said Godley. “The technology behind this software is state of the art and yet incredibly easy to use.” Diaz further noted that “the ability to toggle back and forth between publicly available (SEC filing) documents and our internal document management system is very valuable, particularly when searching for examples of relatively unusual documents or clauses.”

### 2 Significant time savings

“Our lawyers are now able to get their hands on key documents much faster and with greater ease than when we used other third-party search tools for this purpose,” said Godley. “This is an important time saver, especially for transactional lawyers who are often working against unforgiving filing deadlines.”

### 3 Improved collaboration

“The Lexis Search Advantage user interface allows our professionals to quickly save, export and share a search string with their colleagues,” said Godley. “They tell us that this has improved their ability to collaborate with each other and to more efficiently exchange information. We appreciate that LexisNexis product developers were responsive to our requests regarding export functions.”

### 4 Attorney confidence

“An interesting benefit that we have experienced from the software is that our lawyers now feel more confident that they have exhausted our internal work product and firm knowledge bank before going to external sources for needed information,” said Godley. “Confidence is difficult to quantify, but all lawyers want to feel like they have left no stone unturned when it comes to drafting transaction documents or filing compliance forms. Lexis Search Advantage helps us check all of the boxes.”

## About Ropes & Gray LLP

Ropes & Gray LLP is a preeminent global law firm with more than 1,300 lawyers and legal professionals serving clients in major centers of business, finance, technology and government. The firm has offices in New York, Boston, Washington, D.C., Chicago, San Francisco, Silicon Valley, London, Hong Kong, Shanghai, Tokyo and Seoul, and has consistently been recognized for its leading practices in many areas, including private equity, M&A, finance, asset management, real estate, tax, antitrust, life sciences, healthcare, intellectual property, litigation & enforcement, data, and business restructuring.

*The American Lawyer*<sup>®</sup> has named Ropes & Gray to its prestigious “A-List” of elite firms for nine consecutive years—including the number one ranking in 2018—and the *Financial Times*<sup>®</sup> “Innovative Lawyers” awards ranked the firm number two for legal expertise in 2018.

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