



CaseMap® Case Study

Pennsylvania Law Firm Relies on CaseMap® Suite as Central Information Repository for All Cases

Customer Profile

The Law Offices of Daniel J. Siegel, LLC, is a boutique law firm in Havertown, PA, serving clients, including other attorneys, who desire the services of a Philadelphia law firm without incurring the fees and travel required to engage a downtown firm. The firm was founded by attorney Dan Siegel in 2005, who had previously practiced as a partner at two prominent personal injury and mass tort law firms in Philadelphia for a total of 24 years. Siegel is also a highly regarded writer and the author of 13 books on various topics, including legal ethics, workers' compensation law and legal technology.

The Siegel law firm is staffed by legal professionals who assist clients with workers' compensation matters, personal injury disputes, wills and estate planning, and Social Security disability claims and appeals. The firm has also developed a niche practice of providing counsel to other law firms, assisting attorneys with legal writing on motions and other court filings, litigation strategy, trial preparation and assistance with appeals at all levels of state and federal courts.

Situation

"When I joined a mid-sized plaintiffs' firm in 2001, another lawyer in the firm raved about a new software tool he was using to help him organize the various facts, legal issues and individuals associated with his cases," recalled Siegel. "He knew that I was pretty tech-savvy and suggested I give the product a try for one of my upcoming mass torts cases. I was intrigued and decided to give it a shot."

That product was CaseMap®. In the years that have passed since that initial introduction to the software, Siegel has come to rely on CaseMap as his principal organizing platform for litigation management and analysis.

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 also revealing vital "small picture" 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.

CaseMap is the flagship product in a suite of software tools that also includes: TextMap®, a transcript management solution that allows litigation teams to easily search, summarize, annotate, issue-code and attach notes to important passages of case testimony; TimeMap®, a module that transforms case facts into high-quality visual timelines in seconds, selected from more than 30 simple customizable templates; and Sanction®, a trial presentation software that allows litigators to tell a story to jurors that is memorable, persuasive and most favorable for their clients.

“I immediately saw the power of CaseMap as far more than a case analysis software product, but rather as a central repository for all of my cases,” said Siegel. “When I left the firm in 2005 to launch my own boutique law practice, I knew that CaseMap would become one of the foundational technology pieces of my new firm.”

Solution

Siegel knew that he would need to combine efficiency with cost-effective technology to provide his clients with the same level of legal representation they had received when he was a partner in his prior firm.

“As I analyzed my cases, regardless of the size, I quickly realized that the CaseMap suite of products provided the ideal complement in virtually every situation,” said Siegel.

For Siegel, CaseMap serves as the centerpiece technology platform for litigation management because it represents each case’s institutional memory, allowing team members to locate any fact, document or issue in just a few mouse clicks. He deploys the software at the very outset of the litigation workflow so that every relevant document associated with the case can be linked and relationships between all of the players in the case can be understood much more clearly.

Siegel also uses other tools in the CaseMap suite—TextMap and TimeMap—in all types of cases, including personal injury, workers’ compensation, Social Security disability, products liability, commercial litigation, medical malpractice and any other matters in which he needs to review data, create timelines, outline information or review and summarize testimony.

“In fact, we have a policy in my law firm that every single transcript involved in every single case is required to be loaded into TextMap,” he said. “No paper transcripts are used for analyzing cases in our law firm, under any circumstance.”

Siegel shared an anecdote from a recent case in which he was attempting to argue an appeal on a personal injury lawsuit. The case had an unusual fact pattern that required him to understand, analyze and then communicate the chronology of events in a very precise and specific manner.

“I used TextMap and TimeMap to organize various facts and information so I could craft our appellate brief in a manner I had never used before, but which I believed was essential for presenting the facts to the court in a persuasive way,” he recalled. “Our firm ultimately prevailed in the appeal. I have no doubt that the CaseMap tools were the difference between winning and losing that case.”

Likewise, Siegel relies on CaseMap in his niche practice of providing legal services to other law firms. “There is so much information involved in a case that it is easy to overlook a relationship or fail to see the importance of a specific issue when I’m writing briefs or motions for a lawyer,” said Siegel. “With CaseMap, there are shortcuts to help see patterns in case information and then to easily retrieve and review key information. This helps me to understand the bigger picture, organize my thoughts more effectively and then communicate the arguments more persuasively in the documents that I prepare for other lawyers.”

Results

Siegel explains that there are three principal benefits his firm has realized from leveraging CaseMap software as its central repository in all cases:

1. TIME SAVINGS

“CaseMap saves us a tremendous amount of time on the back end of our case management because we deploy it from the very outset of an engagement. It serves as our tool for preparing every aspect of the case so we’re able to record every single piece of information we need at any given moment in the litigation of that case. This is a huge efficiency gain for our boutique firm.”

2. IMPROVED CASE PREPARATION

“CaseMap helps us to prepare our cases more effectively by organizing all of the facts, issues and characters associated with the case. It is a central database for every document, claim, transcript and other information in the case file. This allows us to have a mastery of the details and case relationships that would otherwise be a far more time-consuming, and potentially less accurate process, particularly for a firm of our size and for our clients, who do not need to pay for an army of lawyers as they would with larger firms.”

3. BETTER OUTCOMES

“CaseMap empowers me to do a better job for my clients and, in the end, to deliver better outcomes on my cases. If a technology tool helps you practice more efficiently, more effectively and more successfully, it is truly a weapon for a law firm. The bottom line is that the CaseMap suite is a major reason that my firm’s business continues to grow.”

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