



“CaseMap sends a message to the other side that, ‘Look, we’re organized and we’re ready’”

– *Wendi A. Rogers*
Certified Paralegal/Trial Consultant
Martin & Martin P.C. Attorneys at Law

As any experienced litigation pro will tell you, winning isn’t always about being on the “right” side of the case, whatever the definition of right might be that particular day.

Quite often, it’s more about which side is better prepared to stand its ground until the other side blinks.

Dallas legal firm Martin & Martin P.C. has built an eye-opening arsenal of weapons to make sure they maintain the steadiest gaze in representing their clients, including the owners of the firm – husband-and-wife attorneys Peter and Colleen Martin

Then there’s paralegal and trial consultant Wendi A. Rogers, who lobbied hard for bringing her choice of case management weapons to the firm.

“I’ve been to several different firms, and everywhere I go I tell them, ‘I have to have CaseMap’”

Like the attorneys she supports, Ms. Rogers is relentless in her dedication to Martin & Martin clients, even going so far as becoming one of a very elite group of paralegals to earn certification from the Texas Board of Legal Specialization for Personal Injury Trial Law.

Another key to her success? Ms. Rogers’ insistence on using CaseMap for eDiscovery and trial preparation.

“It helps me do my job more efficiently. Our office is purely digital, so when things don’t come in electronically, we scan them into digital format, then dump all the documents into CaseMap.”

In fact, Martin & Martin took Ms. Rogers’ advice a step further by investing in the entire CaseMap Professional suite to seamlessly manage data from case opening to courtroom summary. The fully-integrated suite includes TimeMap for creating visual case chronologies, TextMap for managing depositions and Sanction for creating presentations, whether it’s to convince a jury in the courtroom or a potential new client in the boardroom.

“With CaseMap, I can organize things and make the necessary notes and once I get them reviewed, I don’t have to do that again.

“I’ve just gotten to the point where I don’t do it any other way.”

“It helps you find the needle in the haystack, and once you’ve found it, you can mark it and find it later”

Ms. Rogers has created a process for organizing case data in CaseMap to make sure details are effectively captured, first categorizing individual documents or case files for discovery responses.

“I go through them, identify what they are, what category they are, and I normally set up different databases in CaseMap so that I have one for documents from the client and another for the discovery and case file.

“For example, with emails and Outlook files, I’ll import them into Casemap then go through and search for the attorneys first off and mark all of those documents with attorney-client privilege.”

From there, Ms. Rogers does another series of searches to separate out case documents into different categories. This is accomplished through using types, issues and notes to make sure all similar data can be sorted together, continuing to follow the process “until we feel like we have run all the searches we possibly can and we’re not coming up with anything different.

“Then I export everything sorted by customized check boxes.”

At that point, Ms. Rogers uses CaseMap for Bates numbering through the document production wizard, which will pull documents for production and numbering using a pre-saved filter.

“I’ll choose the filter, then go ahead and create my directory and CaseMap saves everything by its Bates

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number. Everything we produce, all of the Bates numbers and connecting documents, it's all linked. It's all connected and accessible.

"This whole eDiscovery process through the document production wizard has been wonderful because it's cut down on steps for me. The time savings is significant."

"CaseMap gives us a comfort level in that we know we're ready for trial"

All that fastidious work Ms. Rogers does upfront to get the firm's case data categorized, indexed, Bates-numbered and linked in CaseMap is well worth the effort when it comes time to face the opposition, either across the deposition table or in the courtroom.

"Trial prep has always been so intense because it could be the make or break for whether or not you go to trial.

"If we go through some kind of mediation in the process, the other side can see how we present our case. And once we've presented it, they see what tools we have, how quickly we can access things.

"I do know that it helped us in one case in particular because we had a situation where the judge wanted

us to have one comprehensive exhibit list and the other side was relying on me to put the documents together.

"I had them. They were all organized through Casemap. And I think it helped the other side understand, 'Look, they've got it all. They know it and they're ready to go.'

"So it gives us a firmer position. We resolve a lot of our cases at mediation using these tools."

"I know I said a lot. There's just a lot to say."

According to Ms. Rogers, she's been a CaseMap customer "since its inception," so she pretty much knows the case management program backward and forward.

Still, there are times when even she is unsure how to accomplish a particular task.

"If I come up with something that I think, I should be able to do this, but I don't know how, I just call customer service and say, 'Tell me how you do this.' And they tell me how to do it.

"The customer support is awesome. It's just hard to explain how wonderful it is."

Client Snapshot

MARTIN & MARTIN ATTORNEYS AT LAW

CUSTOMER PROFILE:

Martin & Martin is a three-attorney firm that handles litigation, arbitration and mediation issues; personal injury and death cases; corporate law; construction law; contracts and leases; employment law and more in Dallas, Texas.

BUSINESS SITUATION:

Martin & Martin hired certified paralegal Wendi A. Rogers many years ago as a trial consultant and paralegal. As a long-time user and extreme fan of CaseMap® from LexisNexis®, Ms. Rogers asked the firm to purchase her favorite case management software to help them better prepare for trials.

SOLUTION:

The firm not only invested in CaseMap, but went a step further to purchase CaseMap Professional, a fully-integrated software suite that seamlessly manages data from case opening to courtroom summary. CaseMap Professional includes TimeMap for creating visual case chronologies, TextMap for managing depositions and Sanction for creating presentations, whether it's to convince a jury in the courtroom or a potential new client in the boardroom. According to Ms. Rogers, "It helps you find a needle in a haystack, and once you've found it, you can mark it and find it again later." Ultimately, though, one of Ms. Rogers favorite uses for CaseMap is in making it clear to the team on the other side of the docket that Martin

& Martin won't be intimidated, whether in mediation, at a deposition or at trial. "It helps us send a message to the other side that, 'Look, we're organized and we're ready.'"

PRODUCT SUMMARY:

CaseMap case management software from LexisNexis helps law firms of every size collect, categorize and store case details in a centralized repository so every legal team member can maximize case knowledge, see connections they might otherwise miss and better collaborate with colleagues. The newest version, CaseMap 12.1, makes it easier to find and redact private information from case files, send and review emails and even conduct quick searches to learn how to perform specific tasks with CaseMap.

→ [Read about other LexisNexis Litigation Solutions customer successes.](#)

About LexisNexis Litigation Solutions

The LexisNexis Litigation Solutions portfolio helps law firms and legal departments streamline all phases of the litigation process. For the eDiscovery phase, Lexis® DiscoveryIQ, LexisNexis® Early Data Analyzer, LAW PreDiscovery®, and Concordance® Desktop handle processing and reviewing. CaseMap® covers fact management, while TextMap® helps automate the depositions phase. For jury presentations, TimeMap® is an drag and drop timeline tool, and Sanction pulls shared data from other programs for jury presentation. Learn more about www.lexisnexis.com/litigation.

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LexisNexis Legal & Professional is a leading global provider of content and technology solutions that enable professionals in legal, corporate, tax, government, academic and non-profit organizations to make informed decisions and achieve better business outcomes. As a digital pioneer, the company was the first to bring legal and business information online with its Lexis® and Nexis® services. Today, LexisNexis Legal & Professional harnesses leading-edge technology and world-class content to help professionals work in faster, easier and more effective ways. Through close collaboration with its customers, the company ensures organizations can leverage its solutions to reduce risk, improve productivity, increase profitability and grow their business. LexisNexis Legal & Professional, which serves customers in more than 175 countries with 10,000 employees worldwide, is part of RELX Group plc, a world-leading provider of information solutions for professional customers across industries.

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