Court docket data is important to everyday case research. But can it do more to propel the business side of running a law firm? We wanted to know how law firms can bolster new business and strategize case wins by being the first to know and first to act on new and ongoing case developments. So we decided to get the scoop from a large law firm based in the Northeastern United State that excels at turning valuable docket data into actionable intelligence—for an impressive competitive advantage.

See how Barclay Damon, LLP achieves a higher form of litigation intelligence with the LexisNexis® CourtLink® service.
When law firm Hiscock & Barclay merged with Damon Morey to form Barclay Damon in 2015, it became the largest law firm in Upstate New York, with 275 attorneys across 33 practice areas in 11 strategically located offices, combining for some 250 years of practice. Yet the firm vows never to be satisfied with its success, and continues to win clients in cutting-edge fields such as energy, health care, and intellectual property.

Perhaps it is this commitment to “staying hungry” in an unrelentingly competitive legal market that has led Barclay Damon to look for progressive and unconventional ways to reign over East Coast competitors and continually propel growth. So when the firm discovered that one of the most dynamic tools in its arsenal for new business development and litigation strategy is also one that helps them reach new efficiencies in docket and document research, they were more than pleased.

**CHALLENGE**

Along with the firm’s merger success came pressures typically expected when two firms become one. Because the firm prides itself on passing along cost savings to its clients, it needed to find ways to reduce cost pressures, as well as manage the high demand for docket retrieval and research through its newly formed library department.

“We weren’t doing any kind of streamlined form of docket research,” said Elaine Knecht, director of information resources with Barclay Damon. “We were pulling briefs and documents from PACER, but as you know you can’t do any serious research that way,” she said, referring to the public access system many law firms rely on for docket retrieval. “And, of course, that’s just federal; we also needed state.”

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The 65 additional attorneys who came on board to form Barclay Damon created a voracious appetite for litigation information, yet resources were limited. Between Knecht and another full-time librarian in a different office, “We do a lot of legal research for competitive and business intelligence for our attorneys,” which includes gathering information about prospective or current clients.

With two librarians handling research requests for attorneys spread throughout the 11 offices, Knecht and her associate librarian had their hands full. “We were working with many attorneys who needed to monitor cases carefully, even when they weren’t involved in the case. And that frequently involved weekly, if not daily, usage of PACER to see if anything had happened that would be critically important for our attorneys to immediately get their hands on. So the amount of time that was spent by library staff, as well as the attorneys, was immense,” said Knecht.

As the responsible party for assisting the practice group leaders with the evaluation of new materials, resources and productivity solutions, Knecht knew she needed to find a way to take the pressure off everyone. “Sometimes attorneys would be logging in every single day to try to find info pertinent to their cases, which often meant lots of wasted time,” observed Knecht of the valuable attorney time that would be better spent on billable time for the firm.
The high-volume demand for docket data throughout the multi-office firm was taxing on the limited resources of the library team. “We were not able to do any kind of in-the-document or in-the-brief research, as there was no way to perform searches to find specific info the attorneys were looking for. Attorneys would hand us a case and say, ‘Here’s the brief; I need you to find everything dealing with “X.”’ I would ask, ‘Do you want me to download all of them at .10 per page and then go through every page and look for this?’” To Knecht’s dismay, the answer at times was yes.

**SOLUTION**

Barclay Damon needed a better way to perform docket and document research, monitor and track new and existing case activity, and gather critical intelligence on key players such as expert witnesses, judges, attorneys, litigants and competitors. It found the solution in LexisNexis® CourtLink®.

**SINGLE SEARCH CAPABILITIES**

“As librarians, CourtLink® gives us the opportunity to offer attorneys a streamlined service that we couldn’t before,” said Knecht. “Now we can say, ‘Oh, you’re interested in this case? I will get an update email to you every day tracking the activity.’” The CourtLink interface gives Knecht single-search capabilities to easily filter and customize notifications across jurisdictions and players in litigation by harnessing data from millions of dockets.

**NEW FILINGS ALERTS**

Another big timesaver for the firm is the reduction in review time on behalf of the attorneys. “If I’m tracking say procedural filings, instead of sending them the whole docket and documents that will clog up everybody’s time to look through, I’ll send a snippet that pinpoints only the pertinent information they’re looking for and say, ‘Here are two new procedural filings from today.’” With the CourtLink service, Knecht sets up automatic daily notifications on new filings and new activity in civil court cases she identifies to let attorneys know what’s happening—ASAP.

**STRATEGIC LITIGATION DECISIONS**

But perhaps the alerts and notifications that make the most direct impact on Barclay Damon’s bottom line come from CourtLink® Strategic Profiles, which helps the firm to uncover the litigation history of a potential client or of an opposing party, attorney or law firm—or even the judge assigned to the case—to help predict their next move and plan case strategy accordingly. Said Knecht, “We’re typically tracking three dozen cases in which our attorneys are not named as partners, parties or attorneys, but they have good reasons for wanting to track them. We go into CourtLink® Strategic Profiles on a regular basis to provide nature-of-suit analysis or litigant profiles, which give our attorneys a look at how other law firms have performed and the outcomes of cases.”

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Gathering intelligence on opposing counsel, companies, individuals, witnesses and judges based on their prior performance in state and federal courts gives Barclay Damon the competitive edge for better case outcomes. Knowing which way a judge leans, how an expert has testified or how opposing counsel has fared in similar cases helps firms understand the likely outcome and time to resolution of cases to plot a winning strategy.

CourtLink® Alerts give advanced keyword complaint notification. Know when a company or party of interest is involved in litigation PLUS specific matters referenced in the body of a complaint. Alerts come with complaints attached, only with CourtLink Alerts.

“We have a bunch of alerts running at any given time, which we send out to various practice groups, such as the branding, trademark, copyright group. They get an email every day. We follow all the patent files, and it may be only 830 filings all over the country for a particular attorney group, but sure enough CourtLink tracks and finds any new activity to see if there’s anyone they know on the list,” said Knecht. “CourtLink makes it easier for our attorneys to stay on top of relevant and significant new filings specific to their practice area.”

NEW BUSINESS TRACKING
Finding new business opportunities is another key reason Barclay Damon tracks litigation with the CourtLink service. “We work closely with marketing, providing as much information as we can on both current and potential clients,” said Knecht. By leveraging the CourtLink service to gain access to more than 200 million dockets for comprehensive court records content and receiving timely alerts, the firm is able to easily hunt for new clients, brief existing ones and succeed on new business projects.
Get automatic updates on any new court activity in ongoing litigation.

While Barclay Damon is taking advantage of most every CourtLink feature and benefit to give it the competitive advantage by turning docket data into actionable intelligence, there still remains one that Knecht is looking forward to exploring: CourtLink® Breaking Complaints. Access to this add-on feature ensures hourly email notifications about new suits—faster than they appear on court websites.

“When we first suggest CourtLink to attorneys who are not aware of the power of the program, we’ll often hear, ‘Well, it’s just like PACER,’ and I tell them, ‘No, no, no, it’s like PACER on steroids because there’s so much more that you can do with it.’ Take for example, should you have a client with a common name like Richard Smith, you’re never going to find Richard Smith cases in that system. But there are enough ways to filter and narrow the search down in CourtLink that there’s a reasonable expectation you will find him. That’s one of many reasons I recommend CourtLink.”

Perhaps most importantly, beyond providing a streamlined docket research process for the firm, CourtLink brings together an alert system allowing Barclay Damon to be the first to advise a client when a new case has been filed against them, develop new business opportunities by tracking litigation, become aware of new proceedings in ongoing cases, and be more informed of new filing trends in the courts where its attorneys file and appear regularly. By gathering the information and using it intelligently for winning decision making, CourtLink helps Barclay Damon increase its competitive advantage. Observed Knecht, “I would have never guessed a docket research tool could propel the business side of our firm so substantially.”
MEET BARCLAY DAMON

Barclay Damon, LLP, listed as a "Top 250 Firm" by The National Law Journal®, is a full-service law firm with offices throughout the major cities of New York State and in Toronto, Boston, Washington, D.C., and Newark. With 275 lawyers in 33 practice areas, Barclay Damon is the largest law firm in the Northeastern United States centered outside a major market. Barclay Damon provides comprehensive legal and business counsel to a diverse client base. For more information, visit barclaydamon.com.

ABOUT LEXISNEXIS® LEGAL & PROFESSIONAL

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