

Small-Town Oklahoma lawyer armed with Lexbe battles BigLaw in Arkansas – and wins big!

A Scan-and-Copy Vendor Wouldn't Cut It

David Jones, a litigation partner at Logan & Lowry, LLP (LoganLowry.com), a less-than-a-dozen-lawyers general-practice firm in Grove, Oklahoma, found himself in a fight with not one but two powerhouse BigLaw firms. His client, a piping subcontractor, had been stiffed by the owners and general contractor on a project in Union County, Arkansas. Without complete diversity, venue was fixed in the Arkansas Circuit Court.

From the beginning, Dave (who is quick to note a lack of technical savvy: *“I graduated law school ten years before the first email was sent”*) knew that this case would test his and his firm's resources. The dispute involved a big construction project with a lot of moving parts; there would be far more documents to deal with than his small-town firm typically handled. So, Dave developed an Outline (more about this in a minute) for organizing case information and secured the services of a scan-and-copy vendor.

Very quickly, however, it became apparent that the copy-and-scan vendor just wasn't going to cut it. To stand any chance of adequately representing his client, he needed to be able to locate specific documents quickly, searching by name, issue, date, keyword, or author, to name just a few possible criteria. He needed something more than a service that just converted paper into an electronic format.

“Pretty quickly, we realized that we had bitten off more than we could chew,” said Dave. *“But by that time, it was too late to spit it out.”*

Dave enlisted the aid of his legal assistant, Ruby Wofford, to go on the hunt for someone to help with the collection, organization, and production of data.

The Hunt for a New Solution

Even though Logan & Lowry prides itself on delivering “big city results,” it didn't have much experience handling electronically stored information (ESI) – a situation many boutique firms face. Ruby knew that they would need a vendor who could not only provide the services the case would require, but also hold their hand and guide them through the process.

Lexbe – with its emphasis on smaller firms – looked like it might be a fit. Ruby was impressed with the attitude that Lexbe's marketing and sales team exhibited; they seemed to care about the problems their customers faced and

be willing to help however they could. As it turned out, this initial impression was confirmed many times over.

“Lexbe’s customer service was nothing short of exceptional,” Ruby said.

That customer service would be tested again and again.

Putting Lexbe to the Test

Put yourself in Dave’s shoes: Your litigation team consists of yourself, one associate, and your legal assistant. It’s three months before the trial setting, and key depositions haven’t been taken because you don’t yet have the documents you believe you need to prepare.

You aren’t able to get the defendants’ agreement to an order governing ESI; you believe they’re stonewalling production. You file motions requesting court assistance, but they don’t help. “Y’all are professionals; I’m sure you can work these things out.”

Knowing that there is truth to the adage, “justice delayed is justice denied,” you need to push the case to trial, if at all possible. Then, the other side dumps a million and a half pages of documents on you, all in a figurative pile, with no organization and no effort made to remove duplicates. What do you do?

Dave and his team of two turned to Lexbe. With their case manager’s help, they were able to de-dupe (remove the duplicates), organize, and review the document set in a fraction of the time it otherwise would have taken and schedule the depositions they needed to get the case ready for trial.

The defendants sought a significant delay, but the court granted only a couple of months. The case went to trial with discovery still ongoing.

Never Breaking Stride

One of the ways Dave found the Lexbe platform most useful was in collecting and organizing his client’s own documents. Remember the Outline that Dave developed at the very beginning of the case? Lexbe was able to incorporate the Outline into its organizational system, even so far as to include prefix classifications from the Outline in the Bates-numbering system. That way, Dave and his team could tell by a simple glance at the *page number* assigned to a given document the significance it held in the overall scheme of the case.

Not only that, but Lexbe’s organization allowed Dave to respond without hesitation to any request that the defendants might make for documents or information.

“I never had to blink when it came to discovery,” Dave said. “Anything they asked for, I could find quickly. I was really proud of the way we were able to respond, even with limited personnel.”

The fact that Lexbe is cloud-based meant that wherever they were, whether in the office, during depositions, and even during trial, Dave and his team could locate documents quickly. *“I could go over to Austin [Austin Ervin, the associate assisting on the case] during the trial and say, ‘I want to see x-and-such document; I think it has to do with ...’ whatever the subject matter was, and he could pull it up in a flash.”*

With Lexbe on the Team – Victory!

Through it all, Lexbe was there, *“as much a teammate as a vendor.”*

More than once during the four-week trial, Dave and his team received a load of documents from the defendants late on Friday afternoon. Lexbe would have them uploaded, organized, and ready for review by Saturday. In all, several million pages of documents were produced and processed in the case.

Dave is sure that, without Lexbe on their side, they would not have been able to try the case. Best of all, with Lexbe on the team, Dave claimed victory over the Big Law defense: the court signed a judgment in his client’s favor for nearly \$8 million.

According to Dave: *“I can’t imagine a company being more cooperative, easier to work with, or more invested in our success than Lexbe.”*