

Knowledge Management With PacerPro

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01 Delivering Utility Through Simplicity

PacerPro's like any other utility. We can't do our job without it.

Joseph Gratz,
Partner
Durie Tangri

Here's a riddle: What do email, PDF documents, and electronic court filings have in common? If your first thought was "they're all boring technologies", then you couldn't be more wrong. The answer is: Combine them and you get a knowledge management (KM) solution that is actually used by lawyers, docketing, paralegals, and administrative assistants. In a world filled with magical technology that becomes shelfware, PacerPro has delivered utility by focusing on simplicity.

PacerPro makes PACER work for you.

Peter Breslauer,
Partner
Montgomery
McCracken Walker &
Rhoads

At its core, knowledge management focuses on improving the quality and efficiency of legal work. The most successful KM initiatives – really, any business initiative – requires a ruthless focus on removing pain points and solving practice problems. So before we talk about the technology, let's identify the problems we are trying to solve.

For litigation teams, managing electronic court filings can be time-consuming, stressful, and frustrating for both attorneys and team members:

Peggy Wallace, Lee Godfrey's personal secretary at Susman Godfrey put this succinctly: "If you have never tried to download 44 exhibits plus a main document, you just haven't lived yet. It can take forever."

Law firms often get caught up trying to “boil the ocean”, talking about the “future lawyer” when today’s lawyers have pressing – and solvable – needs. While the receipt and management of electronic court filings may not sound particularly sexy, it is certainly critical to managing litigation.

PacerPro’s focus on automating the download and distribution of federal court filings satisfies key conditions for KM success:

1. It addresses an existing inefficient workflow
2. It lowers risk
3. It increases litigation team efficiency
4. Change management thresholds are low and adoption is rapid because it integrates into existing systems (email, DMS) and substantially improves current processes
5. It captures data to drive internal analysis

02 A PacerPro Primer

The process with the Court's notice is cumbersome - you get notice of a filing and then someone has to click on the notice and download the document(s). That takes some time. And if you're on the road, you don't really have the flexibility of opening a link.

Steve Ludwig
Partner
Fox Rothschild

In this era of working remotely, PacerPro is the perfect app: within seconds of an ECF notification, the new filing appears in your in-box as a PDF, easily viewable on your mobile or tablet.

Robert Owen
Partner
Eversheds Sutherland

Let's begin with a short overview of the benefits PacerPro provides to litigation teams that use traditional, manual processes for managing electronic filing notices.

Federal courts notify counsel of new filings via an email known as a Notice of Electronic Filing (NEF). The NEF in turn contains a hyperlink that provides one-time access to any documents identified therein. To obtain the documents, someone in the firm must manually click the hyperlink in the email. In the case of a filing without exhibits, the underlying filing will download. In the case of a filing with exhibits, the hyperlink will take the user to a menu of links from which they must then individually download each of the documents associated with the filing. After downloading the documents, the user then labels and distributes them, often via email. Given litigation deadlines and the urgent need for real-time access to filings across stakeholder groups (lawyer, docketing, paralegal, secretary, co-counsel, client), it is common for several members of the case team to individually undertake this process. For example, when an important filing from opposing counsel is expected in high stakes litigation — say, a motion for summary judgment — you are likely to see this workflow:

- Associate, paralegal, or docketing member staffed to stay late at the office to download, label, and distribute the document to the team. If staff is not asked to stay late this may occur on the following business day

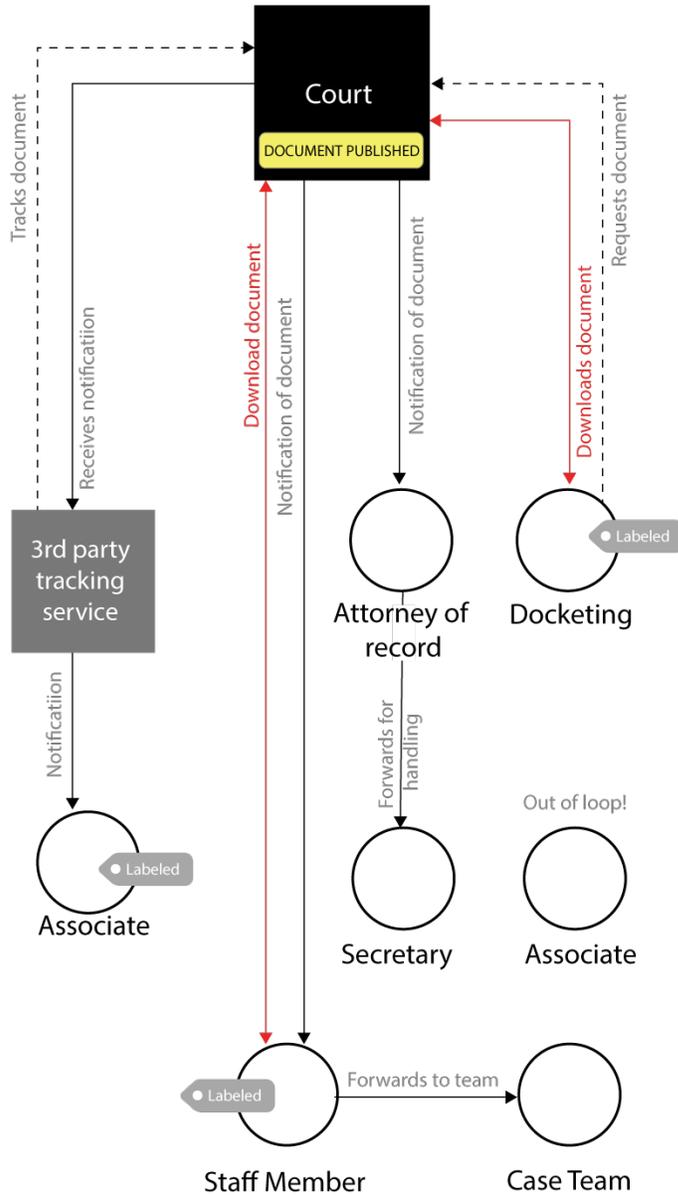
My lawyers are happy to receive their filings so quickly – no more emails passing between assistants, paralegals, and attorneys sending around new filings (and eliminates the problem if you forget to send a copy to a team member).

Lisa Vialpando
Legal Secretary
Lewis Roca
Rothgerber Christie

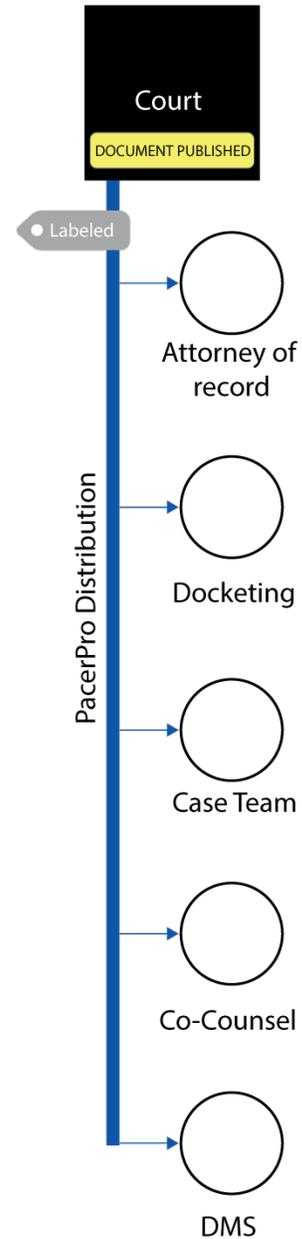
- Team members concerned about missing the notice may sign up for paid third party tracking services to ensure they are not left out of the loop
- When the court notice comes out, attorneys of record on the case (typically partners) may download and review the document and/or forward the notice to a secretary for an immediate download for their personal consumption (in case, for example, the partner needs to jump on a client call before the official distribution has gone out)
- Docketing clerks and records management staff may also download their own copy of the document for calendaring and filing purposes
- Team members signed up for third party alerts will begin to receive re-notification of the same filing
- Team members accidentally left off the distribution will not find out about the new filing until later

With PacerPro's PDF2Go product, these manual processes and stacked inefficiencies are eliminated: after a one-time backend setup, all stakeholders automatically and simultaneously receive PDF copies of the court filings they need to see in their email inbox in real time.

A. Example of complex, error-prone PACER workflows



B. Radical simplification of document distribution with PacerPro



03 Improving Workflow

We're bet-the-company trial lawyers. We can't waste time manually downloading documents, and our case teams and risk management department won't put up with delay waiting for key filings. Automation services like PacerPro, which delivers filings to case teams in real-time, save our team an amazing amount of time, meaning we can stay focused on what matters: our clients.

Ed Miller
Managing Clerk
McKool Smith

A significant pain point in the world of electronic filings is ensuring that all members of a litigation team — lawyers, docketing, paralegals, secretaries — actually receive filing notifications so that they can then quickly act on that content.

These workflows can be difficult to manage under normal circumstances — and busy litigation teams hardly function under nine-to-five conditions!

Maria Molinelli, Managing Clerk at Shearman & Sterling, explains:

For us, it's important that the docket tracks deliver the filings immediately to the attorneys.

Brian Boyle, Associate Director of Knowledge and Research Services at Kramer, Levin, Naftalis & Frankel, explained further:

For us, PacerPro was about transparency: making sure critical information is instantly disseminated across the offices and departments. With high stakes litigation, it's a big thing to know everyone's on the same page.

Outside the case team, automating notification and document delivery also benefits other critical departments by eliminating the need for removing duplicative work. These downstream benefits are described

by Michele Koepf, the Risk and Records Manager at Keker, Van Nest & Peters:

It's a huge help for my calendar docket person to get the PDF directly without having to download anything and also for my records department, whose job it was to download filings and put them in our records database and in a separate case management tool.

04 Risk Reduction

Inconsistent processes increase risk. Raise the issue with any member of a litigation team in a firm lacking clearly defined information governance policies around the management of matter documents and you'll see the anxiety on their faces. One of the most common comments lawyers make to Fireman & Company consultants is "I need to read my colleagues' minds" to know where important information is stored, and to identify the file of record.

Reading minds was hard enough when litigation teams were under the same roof; with COVID-19, many firms are months away from even a partial return to the office — and some functions may remain remote even after offices reopen. We are seeing a significant push in the Am Law 100 to focus on information governance as a key component of managing remote workforces.

PacerPro helps in two ways:

One, for current litigation, by distributing documents via email for immediate consumption by all team members. As Elaine Screechfield, Firmwide Litigation Docket Manager at Morrison & Foerster, and President of the National Docketing Association, put this in the PACER context:

Manual capture is too time consuming and inconsistent. We need to see everything, so automating was a huge benefit.

Brian Boyle, Associate Director of Knowledge & Research Services at Kramer Levin Naftalis & Frankel, adds:

The benefit of PacerPro is everybody's on the same page, even if they're located in different offices. The attorneys don't want to find out later that one of their colleagues was on top of something they didn't know about.

Two, for true risk management, automation needs to go beyond email; documents must be stored in secure, trusted, central repositories. And, the repository most suited to matter management is the document management system. But how do you reliably and consistently get your federal filings into a DMS? PacerPro's PDF2Go service is the answer, as the workflow automation tool not only distributes documents in real time to case teams, it also captures the entirety of the firm's federal filing history (including all associated meta and the correct client matter) in an accessible API. This means that with no further change management efforts or human data entry, firms with PDF2Go setup have a ready to use set of clean, comprehensive records that they can begin piping to firm IT systems, including the document management system, at any time.

Or, as Brian Blaho, National Manager of Research Services Reed Smith, puts it:

At Reed Smith, we look for holistic solutions that enable us to address today's issues –and prepare us for the future. Working with PacerPro, we were not only able to minimize duplicate downloads and streamline delivery of filings to case teams, but also to seamlessly create a comprehensive, organized library of Reed Smith federal filing experience.

Fireman & Company is currently working with one of our longtime clients on their iManage Work 10 redesign and adoption strategy. A key component of this redesign, where we are working to leverage Work 10 as the file of record, is integration with PacerPro to automatically import filings into the iManage matter workspace. PacerPro's DMS integration removes the need for litigation team members to save their NEF emails to the DMS (a human workflow that depends on timely and consistent filing) and adds NEF-specific metadata to the document profile. This type of integration increases overall trust in the DMS as the file of record by eliminating the possibility of human error and by adding contextual metadata to the as-filed document via PacerPro.

05 Measuring Efficiency

PacerPro drives efficiency by immediately delivering copies of filings and orders in ready-to-save format, which in turn helps me better serve our clients and keep them informed at every step of the case. It helps keep our files organized and complete, and dispenses with the time lag, expense, and unreliability of having staff manually retrieve these filings, allowing us to better focus human personnel on other necessary tasks.

Eric Hobbs
Partner
Shook Hardy & Bacon

Law firms could once bury inefficiencies inside billable hours. No longer. Clients are sophisticated and proactive in their management of legal costs, their use of data management to evaluate their outside counsel may exceed the technology available to the law firms themselves. Reducing inefficiencies, then, helps both firms and their clients: Firms do not need to write off time wasted on NEF activities (note: write-offs can be explicit or hidden; the latter takes place when billing resources choose to not capture low-value time), and clients see faster work and cost reductions.

While efficiency gains are difficult to quantify for many initiatives, automation of NEF management is not: on average, it takes three to five minutes to process a court notice manually. Where does this number come from? Consider the steps required from a pre-PacerPro NEF process:

1. NEF received
2. Click hyperlink
3. Download document 1
4. Label document 1
5. Repeat steps 3 and 4 for all documents associated with the particular NEF
6. Drag document(s) into Outlook email
7. Add distribution list to email
8. Add subject line to email
9. Draft email
10. Click send

The automatic downloads and consistent naming of documents have both been great time savers for our office.

Debra Feilner
Docket Administrator
Advanced Certified
Paralegal
Husch Blackwell

To understand the magnitude of this aggregate time suck, consider that an active federal court litigator may receive thousands of NEF emails annually, resulting in thousands of hours of lost time billable hours. For example, in aggregate, the 21 firms participating in this study receive 3,241,589 PDF2Go emails from PacerPro annually, conservatively representing 48,757 hours of eliminated rote work through this feature.

Firms participating include:

Baker Botts LLP; Barack Ferrazzano Kirschbaum & Nagelberg LLP; DLA Piper LLP (US); Durie Tangri LLP; Husch Blackwell LLP; Kecker, Van Nest & Peters LLP; Kellogg, Hansen, Todd, Figel & Frederick P.L.L.C.; Kramer, Levin, Naftalis & Frankel LLP; Lewis Roca Rothgerber Christie LLP; McKool Smith P.C.; Morrison & Foerster LLP; Reed Smith LLP; Richards, Layton & Finger, PA; Shook, Hardy & Bacon L.L.P., Steptoe & Johnson PLLC; Susman Godfrey LLP; Winston & Strawn LLP; Shearman & Sterling LLP.

It is worth noting, due to repeat downloads as different team members access the documents, those baseline numbers quickly snowball – all while members of the case teams wait.

PacerPro eliminates this friction.

06 Change Management

Change management is hard. It requires internal commitment, investment, and follow-up. So, how well-adopted is PacerPro? After all, this is a (1) technology solution that (2) re-imagines team and individual workflows and processes. That should make this a hard sell, particularly where litigation team members have developed their own workarounds to NEF challenges.

And yet:

Once we got PacerPro set up and running in one office, the attorneys started trying to get colleagues in other offices set up –and to add their clients and co-counsel to distribution lists. Brian Blaho, National Manager of Research Services, Reed Smith

Once we got a few cases added through ECF, we saw immediate interest from the attorneys, who wanted to have additional matters added. Brian Boyle, Associate Director of Knowledge & Research Services, Kramer Levin Naftalis & Frankel

There are four reasons why PacerPro appears to defy the conventional wisdom that legal professionals resist change:

1. PacerPro does not require lawyers, docketing, paralegals, and secretaries to fundamentally change; instead, it integrates into a known workflow and removes obstacles to usability.
2. The process is simple: add PacerPro to mailing lists, and let it run. No active user steps are needed; in fact, it reduces steps by attaching filings directly to email.
3. The outcome of the change is immediately recognized as beneficial by the system's users: saved time, reduced risk, and an overall increase in trust that nothing important has been overlooked.
4. PacerPro leverages systems that everyone is already familiar with: email and document management. Everyone knows how to open an attachment, and the DMS increases in value by becoming a trusted repository for filings (and related metadata).

In other words, firms adopt PacerPro quickly because it's familiar, it doesn't require user training, and it delivers a clear, understandable benefit.

07 The Value of Data

PacerPro's API solution fills an obvious need and will dramatically improve life for both our litigation teams and our clients.

Gene D'Aversa,
Director of Project
Management - IT
KNOWLEDGE
MANAGEMENT
Husch Blackwell

PacerPro doesn't just simplify processes; it provides access to an important data set that can be leveraged for multiple purposes within a law firm. PacerPro's data dictionary contains more than fifty highly detailed data types. I have listed a small sample of these below:

- Judge name
- Case title
- Nature of suit
- Time stamp of the most recent change in the case
- Date of first filing
- Date of most recent filing
- Unique court identifier
- Role in case of party, e.g., plaintiff, defendant, etc.
- Attorney role in case

Law firms are embracing data analytics at breakneck speed. Litigation analytics are one of the fastest growing areas of interest for litigation managers, KM professionals, and law firm data scientists. Reporting that assists in outcome predictions, competitive analytics, engagement pricing, and more can be driven by data presented by services like PacerPro. Additionally, many firms are taking steps to leverage third-party data like this in combination with their internal (non-public) data to generate powerful, proprietary reporting on judges, opposing counsel, litigants, and case types.

PacerPro's data can also be delivered to specialized systems like iManage Work 10, which receives both the NEF content and connected case metadata – information that would otherwise require arduous manual entry by a DMS user. Similarly, we foresee these types of data being exported to experience management and firm intelligence platforms, adding a layer of context automatically to litigation matters.

08 Conclusion

In my experience, innovation doesn't take an explosion of ideas. It's the small, simple steps we can take to make life better.

Mark Combs
Chief Information Officer
Step toe & Johnson

I have worked on knowledge management projects for over twenty years. KM is a constantly evolving field that has always adhered to one core principle: Improve the practice of law.

Of course, fulfilling this mandate is challenging at the best of times. When a solution comes along that contributes materially to the quality and efficiency of a practice, in a cost-effective and consistent manner, it sometimes feels too good to be true. In the case of PacerPro, it's actually true. By keeping their solution simple for users, by integrating into while improving existing processes, **by demonstrating simple and effective efficiency, and by delivering valuable data points for firm analytics PacerPro has delivered a powerful KM solution.**

At Fireman & Company we have a simple formula for change management: Adoption occurs when users discover that a product is usable and useful. It's nice to have found a solution that meets this standard.

UNDERSTANDING THE NUMBERS

In the following pages, we present 18 case studies covering usage of one of PacerPro's features, PDF2Go, at individual firms. These case studies include both the number of PDF2Go delivered to an individual firm in a calendar year as well as an estimated number of hours saved, assuming that it takes an individual five minutes to process an individual Notice of Electronic Filing and that only one individual processes each notice in the status quo. These estimates are designed to help conservatively quantify PacerPro PDF2Go's impact at particular firms. It is important to note, however, that the case studies do not enable an apples-to-apples comparison between firms. How many filings PacerPro processes for a firm depends not only on litigator headcounts and caseloads, but also how case teams are staffed and the type of cases the firm is litigating. For example, a firm involved in a large multi-district action may receive many more filings than a firm handling mainly white-collar matters. What is shared among the firms is a commitment to adopting technology that drives value and cost savings in the delivery of service to clients.

Case Study

DLA Piper



419,607

Annual PDF2Go Emails Sent

6,308

Hours Saved

Goals: Automate data capture; eliminate delay in notifications; standardize process

Project leads: Jean O'Grady, Senior Director of Research & Knowledge
Tony Cerda, Docket Manager

US offices: 27

Start date: 2016



PacerPro enabled us to eliminate redundant workload and streamline the distribution of PACER filings to litigation team members.

– Jean O'Grady, Senior Director of Research & Knowledge

Case Study

Durie Tangri



24,317

Annual PDF2Go Emails

284

Hours Saved

Goals: Immediate streamlined access to court filings

Project lead: Joseph Gratz, Partner

US offices: 1

Start date: 2015



PacerPro's like any other utility. We can't do our job without it.

– Joseph Gratz, Partner

Case Study

Hughes Hubbard



93,719

Annual PDF2Go Emails

1,613

Hours Saved

Goals: At Hughes Hubbard, we've always taken a proactive approach to technology. Because of this, we're often able to bring on new tools ahead of the market, affording our attorneys, and our clients, a higher level of service.

Project lead: Patricia Barbone, Director of Library Services

US offices: 5

Start date: 2016



The attorneys very quickly started to see the value and it spread like wildfire.

– Patricia Barbone, Director of Library Services

Case Study

Husch Blackwell



131,427

Annual PDF2Go Emails

4,139

Hours Saved

Goals: Standardize file names, streamline process, build clean, comprehensive data set

Project lead: Gene D'Aversa, Director of Project Management - IT, Knowledge Management
Debra Feilner, Docket Administrator and Advanced Certified Paralegal

US offices: 20

Start date: 2018



The automatic downloads and consistent naming of documents have been great time savers for our office.

– Debra Feilner, Docket Administrator and Advanced Certified Paralegal



Automation enables us to address stacked inefficiencies, streamline workflow, data capture, and improve life for both our case teams and clients.

– Gene D'Aversa, Director of Project Management - IT, Knowledge Management

Case Study

Keker, Van Nest & Peters



82,373

Annual PDF2Go Emails

616

Hours Saved

Goals: Reduce redundant downloads, streamline process, and improve attorney experience

Project lead: Michele Koepf, Records and Risk Manager

US offices: 1

Start date: 2016



After the roll-out, one of the attorneys wrote an email to the managing partner, congratulating me on the product.

– Michele Koepf, Records and Risk Manager

Case Study

Kellogg Hansen



46,813

Annual PDF2Go Emails

567

Hour Saved

Goals: Free staff to perform higher value work; improve access to PACER data for lawyers and case teams

Project lead: Bernadette Murphy, Paralegal Director

US offices: 1

Start date: 2014

“*Kellogg Hansen takes an entrepreneurial approach to practice, enabling us to avoid bureaucracy and conflicts and equipping us with a streamlined ability to onboard cutting edge technology. We adopted PacerPro within months of the company's launch. Since then it has been the fastest and easiest way for me to stay on top of my own cases and the cases I need to follow.*”

— Scott Angstreich, Partner

Case Study

Kramer Levin



230,374 2,536

Annual PDF2Go Emails

Hours Saved

Goals: Improve attorney experience, reduce paralegal rote work, increase awareness of firm experience

Project lead: Brian Boyle, Associate Director of Knowledge and Research Services

US offices: 2

Start date: 2016

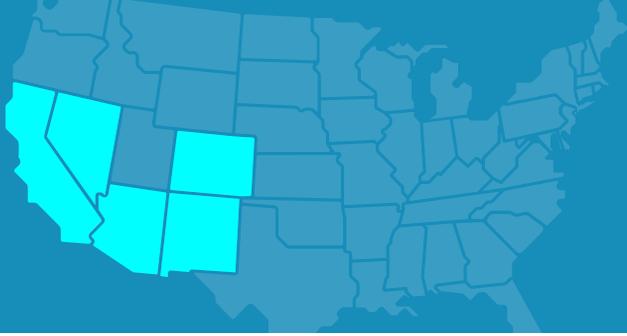


For us, PacerPro was about transparency: making sure critical information is instantly disseminated across the offices and departments. With high stakes litigation, it's a big thing to know everyone's on the same page.

– Brian Boyle, Associate Director of Knowledge and Research Services

Case Study

Lewis Roca



101,380

Annual PDF2Go Emails

3,011

Hours Saved

Goals: Maximizing outstanding client service by utilizing industry leading technology to provide the firm's lawyers and staff with an efficient and seamless way to manage the receipt and distribution of federal case filings. Enhancing the firm's loss prevention measures and knowledge management systems.

Project lead: Jeff Siatta, Docketing Manager

US offices: 9

Start date: 2020



Love the almost-instantaneous PDF of the filing! Thank you.

– Nicole Scott, Associate



My lawyers are happy to receive their filings so quickly – no more emails passing between assistants/paralegals/attorneys sending around new filings (and eliminates the problem if you forget to send a copy to a team member).

– Lisa Vialpando, Legal Secretary



I like it a lot. It's so nice to be able to save the pleading to iManage directly from the pdf in PacerPro rather than having to download from the court's website. Also, I no longer have to download the pleadings and then email them to the team, because everyone is receiving the PacerPro email. I know the attorneys are appreciating getting those pleadings and the ease of being able to forward them to the client.

– Kathy Topczewski, Legal Secretary

Case Study

McKool Smith



67,801

Annual PDF2Go Emails

1,125

Hour Saved

Goals: Standardize process and naming conventions across offices, improve case team experience, reduce redundancy

Project lead: Ed Miller, Managing Clerk

US offices: 7

Start date: 2017



We're bet-the-company trial lawyers. We can't waste time manually downloading documents, and our case teams and risk management department won't put up with delay waiting for key filings. Automation services like PacerPro, which delivers filings to case teams in real-time, save our team an amazing amount of time, meaning we can stay focused on what matters: our clients.

– Ed Miller, Managing Clerk

Case Study

Montgomery McCracken



55,455

Annual PDF2Go Emails

2,373

Hours Saved

Project leads: Kathleen Coon, Director of Library & Research Services

US offices: 5

Start date: 2015



With PacerPro, gone are the hours of attorney and support-staff time manually downloading and forwarding case documents. PacerPro's automatic distribution to your team means everyone's informed at once, and the ability to review filings on your mobile device as they happen, day or night, is incredibly useful.

– Peter Breslauer, Partner



PacerPro not only improves our workflow tracking federal cases and collaborating with case teams, it allows us to pull large volumes of court documents in seconds. This document management tool has become a must-have for our litigation and bankruptcy practices, especially with remote work being the new normal. It keeps all our attorneys on the same page.

– Kathleen Coon, Director of Library & Research Services

Case Study

Morrison & Foerster



370,318

Annual PDF2Go Emails

3,089

Hours Saved

Goals: Ensure docketing team receives notifications of all new filings for risk management, decrease rote work

Project lead: Elaine Screechfield, Firmwide Litigation Docket Manager; National Docketing Association President

US offices: 9

Start date: 2016



Automating PACER just made sense; whether you're focused on risk management and efficiency or on collaborating with your KM or BD departments on data projects, manual capture is too time consuming and inconsistent.

– Elaine Screechfield, Firmwide Litigation Docket Manager

Case Study

Reed Smith



245,145

Annual PDF2Go Emails

5,008

Hours Saved

Goals: Eliminate redundancy and unnecessary charges, create Reed Smith PACER library

Project lead: Brian Blaho, National Manager of Library Services

US offices: 17

Start date: 2014



At Reed Smith, we look for holistic solutions that enable us to address today's issues - and prepare us for the future. Working with PacerPro, we were not only able to minimize duplicate downloads and streamline delivery of filings to case teams, but also to seamlessly create a comprehensive, organized library of Reed Smith federal filing experience.

– Brian Blaho, National Manager of Research Services

Case Study

Richards, Layton & Finger



104,758 4,781

Annual PDF2Go Emails

Hours Saved

Goals: Improve efficiency and PACER search and download.

Project lead: Robert Guerrero, Library Manager

US offices: 1

Start date: 2015

“ *The idea was to centralize the control and distribution of bankruptcy filings, which has happened. What we hadn't expected was how much easier it would make collaboration with co-counsel.* ”

— Robert Guerrero, Library Manager

Case Study

Shearman & Sterling



157,360

Annual PDF2Go Emails

1,770

Hour Saved

Goals: Eliminate delay and streamline process; reduce redundant fees

Project lead: Maria Molinelli, Managing Clerk

US offices: 7

Start date: 2017



For us, it's important that the docket tracks deliver the filings immediately to the attorneys. The system also improves ECF coordination and internal case file maintenance."

— Maria Molinelli, Managing Clerk

Case Study

Shook Hardy & Bacon



208,044

Annual PDF2Go Emails

2,862

Hours Saved

Goals: Streamline process, improve attorney experience, free staff for higher value work

Project lead: Jeff Sewell, Director of Library and Knowledge Services

US offices: 14

Start date: 2019

“PacerPro drives efficiency by immediately delivering copies of filings and orders in ready-to-save format, which in turn helps me better serve our clients and keep them informed at every step of the case. It helps keep our files organized and complete, and dispenses with the time lag, expense, and unreliability of having staff manually retrieve these filings—allowing us to better focus human personnel on other necessary tasks.

— Eric Hobbs, Partner

“Efficiency is essential in our practice. PacerPro cuts down the time that would otherwise be required to log-in to CM/ECF, download (one file at a time), save to our network, and distribute out to the team.

— Darlene Cho, Of Counsel

“PacerPro makes my life as a litigator easier. I automatically receive PacerPro emails within seconds of filings attaching PDFs of the filed documents. The PDFs are conveniently titled with the date, document type, and docket number.

— Matt Light, Associate

Case Study

Steptoe & Johnson



18,675

Annual PDF2Go Emails

680

Hour Saved

Goals: Eliminate rote work, standardize processes, improve data & experience capture

Project leads: Mark Combs, Chief Information Officer

US offices: 14

Start date: 2019



In my experience, innovation doesn't require an explosion of ideas. It's the small, simple steps we can take to make life better.

– Mark Combs, Chief Information Officer

Case Study

Susman Godfrey



138,207

Annual PDF2Go Emails

1,590

Hour Saved

Goals: Automate the download of federal filings and provide a means to circulate them quickly and efficiently to all firm users

Project lead: Trey Peacock III, Partner

US offices: 4

Start date: 2015



At Susman Godfrey, we believe you get the best results when the interests of clients and legal teams are fully aligned. One key aspect of our firm is our case teams aggressively seek out and adopt technology and efficiency tools such as PacerPro to reduce cost and improve performance. Because in the end, this is about winning – and doing so as efficiently as possible for the client.

– Trey Peacock III, Partner

Case Study

Winston & Strawn



398,907

PDF2Go Emails Sent Annually

4,389

Hour Saved Annually

Goals: To streamline the filings distribution process and significantly reduce duplicate document pulls and related charges.

Project leads: Gwen Watson, Director of Legal Technology Innovation
Amber Goodenough, Docket Manager & Counsel

US offices: 9

Start date: 2018

“ At Winston, we wanted to both automate the distribution of filings to case teams and realize the ROI from using their PACER overlay for docket research and retrieval. The latter meant changing user behaviors. To move that needle quickly, it took a close, collaborative effort across different business teams, each working from their respective strengths.

– Gwen Watson, Director of Legal Technology Innovation

“ I can attest that this service has made my life easier by a magnitude of at least 10. It makes life so much easier to have the documents in front of you as needed.

– Kathleen Kim, Associate