

FOUNDATION INNOVATION AWARDS 2026 WINNER

How Jackson Lewis Built a High-Impact Matter Data Program with Litera Foundation

JacksonLewis

PRODUCT

Litera Foundation

ORGANIZATION SIZE1,100+ attorneys
across major US cities**LOCATION**

New York, NY

38kmatters structured
in Foundation**64k+**statutory references normalized Security
controls that checked every box**~8k**matter narratives
AI-generated

Jackson Lewis had been operating with a matter information system dating from the early 1990s. Attorneys had long since stopped contributing, and matter data had fragmented across personal spreadsheets, proposal books, and siloed repositories. When a high-profile pitch was missing pertinent experience data, the gap became impossible to ignore.

The team selected Litera Foundation as the replacement and designed every workflow around a single constraint: attorney time is non-negotiable. Rather than ask lawyers to change behavior, the team worked around it — using GenAI to draft matter narratives directly from complaints and case documents. Attorneys were asked only to review and approve.

"This would not have happened if GenAI didn't exist. We are not asking the attorneys to draft. We are doing it all ourselves and asking them just to review it."

Trina diNapoli, Director of Marketing & BD Ops and Systems, Jackson Lewis P.C.

A structured pilot with select practice groups surfaced an early insight: in a labor and employment firm, most matters share surface similarities, making prioritization harder than incorporate practices where deal size creates a natural hierarchy. That learning shaped how the team prioritized matters before scaling firm-wide.

As awareness grew internally, the team identified several organic channels of matter data already flowing through the firm, practice group leader updates, office distribution emails, KMAs embedded in practice groups, and the internal proposals team. Each was built into a single intake workflow feeding Foundation, enabling scale without requiring firm-wide behavior change.

- **Research quality transformed** — Power users report significantly easier, more productive work. Their output supports both marketing and billable client research.
- **Cross-department visibility** — Matter profiling now surfaces closure notifications and status updates to teams that previously had no line of sight.
- **Scalable, repeatable process** — AI + coordinated intake replaced a fully manual workflow, enabling matter capture at national scale.

"We've designed something that is slowly but surely improving our ability to answer questions about firm experience and improving the data within other firm systems."

Trina diNapoli, Director of Marketing & BD Ops and Systems, Jackson Lewis P.C.

Next: AI agents to further automate the narrative workflow, docket data integration for judge and opposing counsel insights, and a firm-wide re-introduction of Foundation built on demonstrated ROI.