

CaseBot™

Agentic Case Intelligence Built on the Matter Record

CaseBot is an agentic AI system for working directly with a matter's verified documents. Attorneys can ask questions in natural language or run **one of eight expert-designed Skill Agents** that apply a defined methodology to investigate the record.

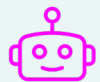
TWO WAYS TO WORK

Conversational Q&A

Ask a question in natural language. CaseBot investigates the matter record and returns a grounded answer with factual assertions tied to cited source material.

Specialized Skill Agents

Run an expert-designed workflow for a specific legal task. Each Skill Agent investigates the same record but produces structured, attorney-ready work product with findings tied back to the source material.



CaseBot™

The distinction is simple: Ask CaseBot lets the attorney direct the inquiry. Skill Agents bring the methodology.

ONE AGENTIC EVIDENCE ENGINE

Both experiences run on the **same agentic evidence engine**. CaseBot searches the record, reads what it finds, follows new leads, tests contrary evidence, and cross-checks the record before producing a result.

Skill Agents use the same agentic evidence engine, but direct its successive searches, analysis, and verification using an **expert-designed methodology** for the task.

BUILT ON THE RECORD

CaseBot works only from the documents in the matter and follows a **consistent evidence discipline**:

- Every factual statement is tied to cited source material.
- If the record does not support something, CaseBot does not state it as fact.
- CaseBot distinguishes evidence that something did not happen from simply finding no evidence.
- Gaps in the record are identified rather than filled in.
- Conflicting evidence is preserved rather than resolved.
- Inferences are clearly identified and flagged for verification when appropriate.

The **same evidence discipline** applies to both natural-language answers and Skill Agent outputs.

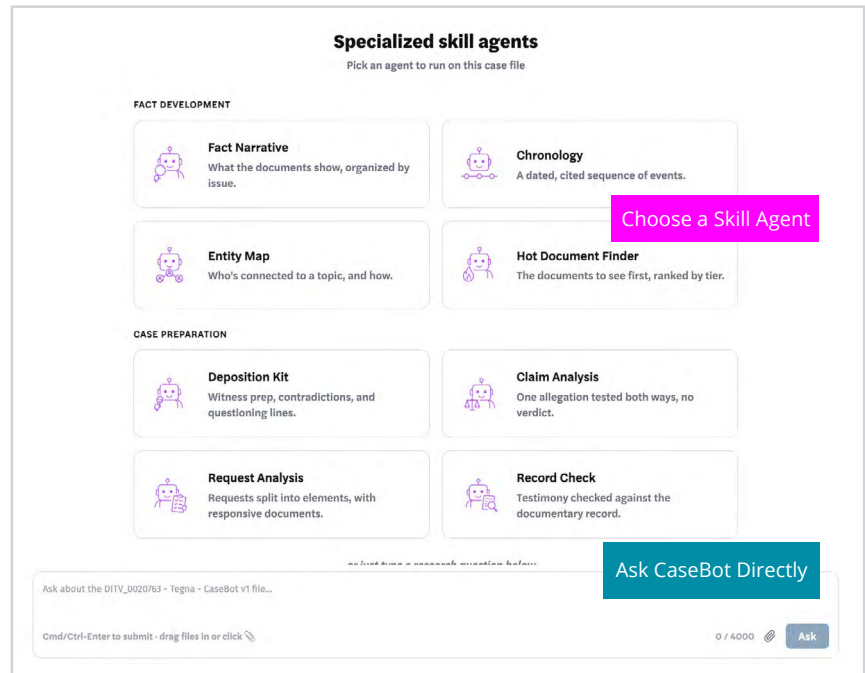
How CaseBot Works in Practice

Ask a question or select a Skill Agent. CaseBot investigates the matter record and returns a structured, evidence-backed result you can review, verify, and export.

01

Choose how you want to work.

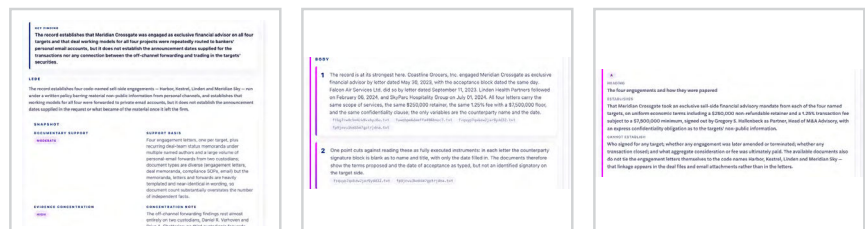
Ask CaseBot a question in natural language or select one of eight expert-designed Skill Agents.



02

CaseBot investigates the record.

CaseBot searches, reads, follows leads, tests contrary evidence, and cross-checks the matter record as it builds the result.



03

Review, verify, and use the results.

Follow findings back to the underlying evidence, see what the analysis rests on and where the record is limited, and export the result as a structured PDF.



Specialized Skill Agents

Every Skill Agent follows a **common result structure** so attorneys can quickly understand both the finding and the strength of the record supporting it. Each result opens with a concise assessment of what the available documents establish.

Key Finding

A one-sentence statement of what the record establishes, does not establish, or leaves unresolved.

Snapshot

A summary of the documentary footprint, including the relevant documents, custodians, date range, and primary actors.

Documentary Support

STRONG · MODERATE · LIMITED

How well the record supports the finding:

An assessment based on factors such as the number of independent supporting documents, number of custodians, diversity of document types, and degree of corroboration. It measures the strength of the documentary record, not model confidence.

Evidence Concentration

HIGH · MODERATE · LOW

How broadly the support is distributed:

An indication of how concentrated the supporting evidence is. A high concentration means the finding depends heavily on a small number of documents or a single custodian, which is identified as a limitation.

EVIDENCE AND ANALYSIS

Each substantive finding identifies:

What the evidence says and the context that gives it meaning.

Who authored, received, or participated in it where relevant.

Why it matters to the issue being analyzed.

The supporting citations, analytical basis, and any verification required.

CaseBot describes what the record shows and why it matters. It does not make legal conclusions or tell the attorney what the evidence proves as a matter of law.

BASIS AND LIMITATIONS

Each result closes by showing what the analysis rests on and where the record is limited.

Rests On

The primary evidence on which the result materially depends.

Where the Record Is Thin

Missing custodians, devices, collections, and other gaps where the record provides no answer.

Documents or leads that initially appeared significant but were undermined by surrounding context are not silently discarded. They are preserved in a visible set-aside section with the reason and supporting citation.

The Eight Skill Agents

The Skill Agents fall into two categories: **Fact Development**, which helps attorneys understand the record, and **Case Preparation**, which turns that understanding into usable litigation work product. Every skill accepts a focus that scopes the work; where a skill also needs a specific anchor, such as a witness, an allegation, or a set of requests, that is noted.

FACT DEVELOPMENT: UNDERSTAND THE RECORD



Fact Narrative

Builds an issue-organized factual account of what the record establishes, what cuts against it, and what remains unresolved.

Requires: A topic or issue. **Best for:** Getting up to speed quickly on the facts surrounding an issue.



Chronology

Creates a dated timeline of key events, recurring patterns, significant communications, and gaps in the record.

Optional focus: Time period, topic, or scope. **Best for:** Tracing events and identifying timing patterns or anomalies.



Entity Map

Identifies the people and organizations that matter, ranks their significance, and explains their relationships to the issue and to one another.

Requires: A topic or issue. **Best for:** Understanding who is who and how the relevant actors connect.



Hot Document Finder

Identifies and ranks the documents most likely to matter, with an explanation of why each warrants attention. **HOT · WARM · NOTABLE**

Optional focus: A topic or type of significance. **Best for:** Narrowing a large record to the documents most likely to matter.

CASE PREPARATION: ACT ON THE RECORD



Deposition Kit

Creates a witness-preparation package with background, examination areas, relevant records, and potential questions grounded in the record.

Requires: A witness. **Optional focus:** An examination topic or issue. **Best for:** Preparing for deposition or witness interview.



Claim Analysis

Tests an allegation against the available record by organizing supporting evidence, contrary evidence, and the issues that are unresolved.

Requires: An allegation, claim, or theory. **Best for:** Pressure-testing a claim, defense, or factual contention.



Request Analysis

Breaks a request or subpoena into requirements, identifies responsive documents, and assesses the documentary coverage for each request.

Requires: Document requests or a subpoena. **Best for:** Evaluating and preparing discovery responses.



Record Check

Compares testimony or other factual assertions against the matter record and classifies each as Supported, Contradicted, Mixed, or Unsupported.

Requires: A witness and key statements. **Optional focus:** A topic. **Best for:** Testing testimony after a deposition or interview.