



A Relativity White Paper

From Exhaustion to Execution: Strengthen Your Case Strategy with Generative AI

A Guide to Transforming Litigation
Strategy with AI

Contents

From Exhaustion to Execution: Strengthen Your Case Strategy with Generative AI.....	3
A Guide to Transforming Litigation Strategy with AI.....	3
Understanding Case Strategy as the Essential Framework for Success	3
Challenges with Traditional Case Strategy Approaches.....	3
Generative AI in Action: Transforming Case Strategy and Delivering Real-World Value	5
Relativity aiR for Case Strategy: Empowering Global Case Teams with Generative AI	7
Real-World Benefits for Legal Teams.....	11
Conclusion: Transforming Litigation with Generative AI.....	12

From Exhaustion to Execution: Strengthen Your Case Strategy with Generative AI

A Guide to Transforming Litigation Strategy with AI

It's 8:00 p.m. Your desk is covered in exhibits and witness statements. You have a timeline spreadsheet, more PDFs than hours in the day, and an outline open on your computer. And you're desperately trying to finish cross-examination prep so you can finally get home. Sound familiar?

It's the part of the job that keeps you up late, but it's also the part that makes it worth showing up. This is where the case gets built – or broken. Spreadsheets, Post-it Notes, and sheer human effort have long driven this work. Beyond crafting the narrative, it takes painstaking attention: pulling out key facts, assembling timelines, tracking issues across documents, and positioning the right evidence where it will matter most.

For the last 20 years, this part of the legal process has remained largely untouched by technology. Now, generative AI is changing that.

Today, generative AI gives lawyers, investigators, and their teams the opportunity to streamline key workflows, uncover important insights earlier, and spend less time on repetitive tasks, freeing them up to focus on strategic decision-making.

This white paper examines how advanced generative AI technology – most notably Relativity aiR for Case Strategy – is transforming modern legal work.

Understanding Case Strategy as the Essential Framework for Success

First, let's level set. For the purposes of this white paper, when discussing "case strategy," we're talking about the thoughtful, intentional, and proactive approach lawyers take to identify critical evidence, build persuasive narratives, anticipate opposing arguments, and guide legal proceedings toward favorable outcomes. While practices vary across different jurisdictions, the fundamental goals remain consistent worldwide: clearly understand the case, align facts with legal arguments, and effectively communicate a cohesive story.

Strategy doesn't stand still. Once initial steps are set, you're constantly reassessing, testing whether the documents you've chosen still strengthen your case, whether a witness statement is holding up under scrutiny, or whether an argument you thought was solid is starting to show cracks. The story of a case shifts as evidence comes into play, and the best lawyers keep pace with that evolution. They weigh strengths and weaknesses at every stage, refine their arguments to stay sharp, and look for opportunities to either reinforce their own position or undercut the opposition's.

Challenges with Traditional Case Strategy Approaches

One of the hardest parts of building a case strategy is the fear that something important will slip through the cracks. Lawyers at every level worry about missing that one document, email, or text message that could make or break their argument, or worse, unintentionally help the other side.



AI You Can Trust

Following Relativity's [AI principles](#), Relativity aiR – including aiR for Case Strategy – delivers purpose-built AI for legal teams, with transparency, security, and trust at its core. With aiR, you can expect:

- **Outputs Anchored in Evidence:** aiR doesn't just spit out an answer. Every decision is tied to a specific source document, with citations and rationale included. There are no "black box" answers – just results you can verify and defend.
- **Security & Privacy:** All aiR products run within the RelativityOne Authorization Boundary and leverage an integration with Microsoft Azure's OpenAI service. Customer data is never shared with third parties or stored in Azure, ensuring confidentiality at every step. Learn more about Relativity's focus on security and privacy in the development of generative AI solutions [here](#).
- **Transparency & Confidence:** Every aiR output is transparent and explainable, giving legal teams the confidence they need to use results in court, in client conversations, and with opposing counsel.

With aiR for Case Strategy, you get the benefits of automation and insight without compromising on trust, security, or defensibility.

That pressure is only growing. Case teams today are drowning in data: emails, chat messages, contracts, transcripts, meeting notes, and witness statements. Trying to stitch all this together into a single, clear narrative with evidence to meet your burden of proof takes enormous time and effort. It's not just labor-intensive – it's a liability. When the story is scattered across spreadsheets, emails, sticky notes, and even across different members of the team, each working in their own silo, something critical will be missed. The only question is when.

And then there's the cost. Manual case preparation eats up hours of time (some of which is inevitably non-billable), and because facts often aren't clear until late in the process, budgets balloon with last-minute work. Add in the human element – people interpreting facts differently, fatigue setting in after reading hundreds of pages – and consistency becomes another challenge.

It's no wonder that many teams are looking to generative AI to help.

But adoption hasn't been without hesitation. Some lawyers are understandably cautious, worried about things like:

- **Hallucinations:** AI tools sometimes "make up" citations, quotes, or facts. We've already seen public examples where fabricated case law ended up in a court filing because it wasn't checked for accuracy. When you're dealing with facts across multiple sources, the idea that a fact could be "made up" is a nightmare scenario no one wants to risk.
- **Security & Confidentiality:** Protecting sensitive case data is non-negotiable. Stories of confidential information leaking into public AI systems have made headlines, and they reinforce why many firms hesitate to put client data anywhere near an AI tool.
- **Transparency & Explainability:** Even when the output looks useful, lawyers need to stand behind it. If they can't show where a fact came from or explain how AI reached its conclusion, it's a risk. Without transparency and a clear evidentiary trail, no case team is going to feel comfortable relying on it in front of a judge.

These challenges – both old and new – highlight the need for a smarter, integrated approach. One that reduces manual effort and silos, while also addressing lawyers' very real concerns about security, privacy, and reliability.

Generative AI in Action: Transforming Case Strategy and Delivering Real-World Value

Lawyers who have embraced generative AI technology are fundamentally reshaping how they approach and execute case strategy. Experienced professionals increasingly highlight the significant and measurable improvements that AI-driven tools bring to their daily practice and key litigation milestones.

Balancing the Art and Grind of Depositions

Deposition prep and analysis are notorious time sinks. But it's one of the most intellectually challenging, and yes, even fun, aspects of litigation: the strategic dance of anticipating arguments, crafting that perfect "gotcha" question, or preparing your client for the spotlight. No matter how rewarding the work is, though, no one has time to fumble through a 500-page transcript the night before a deposition.

Generative AI doesn't replace the skill or creativity that makes this part of the law rewarding. Instead, it takes on the grind so lawyers can focus on the strategy. Witness summaries and first drafts of depo outlines that once took hours can now be generated in minutes.

And the benefits of generative AI aren't limited to the deposition preparation process. Quick summaries of transcripts give the ability to pinpoint testimony (even out of a rough transcript). Need to find exactly where a topic arose across a multi-day deposition? Instead of guessing the right keyword to CTRL-F, AI can point you there instantly. That shift means less time hunting for a starting point and more time refining the big picture of how testimony fits into your overall case strategy. Likewise, when multiple depositions are happening simultaneously across different jurisdictions, AI makes it possible to stay on top of themes as they develop: what opposing counsel is asking, what your witnesses are saying, and where issues might crop up in future examinations. These are the kinds of challenges that traditionally eat up time and create stress, but with generative AI, they become manageable and strategic.

This improved process does more than simply save time – it enhances lawyers' confidence and strategic effectiveness during critical depositions.

“Opposing counsel once tried to expand the scope of discovery by claiming something was said in a deposition that I knew didn't line up. Normally, that would have meant combing through 600 pages of transcript under extreme time pressure. Instead, I used generative AI to instantly zero in on the exact testimony. What could have been a fire drill turned into a five-minute fact-check – and a quick, confident response back to opposing counsel.”

Bobby Malhotra

Partner, Winston & Strawn

“Depositions have always been tedious and inefficient. Generative AI is changing that. Tasks that once took hours now take minutes, significantly reducing preparation time and stress.”

Bobby Malhotra

Partner, Winston & Strawn

Reducing Redundant Work and Improving Resource Efficiency

Case teams frequently struggle with repetitive tasks when building their case strategies, often revisiting the same data multiple times throughout a case. Generative AI directly addresses this inefficiency by swiftly identifying key facts and supporting documents behind them at the earliest stages of the case.

This significantly reduces redundant work, freeing litigators to focus on strategic tasks like ensuring evidence exists for each claim or defense, building out their dispositive motions, or preparing to examine witnesses.

Breaking Down Silos to Build Stronger Case Strategies

One of the quiet killers of case development isn't just the mountain of data; it's the way information gets stuck in silos. Partners, associates, litigation support, and paralegals often end up working in their own lanes, with different tools and incomplete views of the facts. Review teams might focus on responsiveness, while associates try to connect themes, and partners attempt to stitch it all together at the eleventh hour. That fragmentation slows everything down and increases the odds that critical insights never make it into the case narrative.

Generative AI helps flip that script. Instead of each group working off its own slice of the data, AI-generated chronologies, summaries, and fact analyses create a shared foundation the whole team can build on. Everyone sees the same set of insights – backed by document citations and rationale – so there's no need to reinvent the wheel or wait for information to be filtered through layers of the team.

When the whole team can operate from the same set of facts and insights, case development stops being a disjointed relay race. Instead, it becomes a collaborative, dynamic process where every member of the team contributes to refining and pressure-testing the strategy from the outset.

Meeting and Exceeding Client Expectations

Clients have no patience for waste. They expect efficiency, transparency, and innovation –and they're quick to notice when they don't get it. Firms that can't show they're using the best tools to deliver results won't just lose the case – they'll lose the client. Generative AI lets firms deliver on all three expectations. By shifting resources from rote tasks to strategic work, budgets become easier to manage, alternative fee arrangements make more sense, and firms can demonstrate real innovation in how they serve clients.

“Creating chronologies manually has historically required dozens of hours and meticulous synthesis. Using AI dramatically reduces this time, giving our teams an immediate, accurate view of critical events.”

Michael Frankel

Counsel, Troutman Pepper

“In the past, review teams worked on responsiveness, associates picked through documents for issues, and partners tried to piece it all together. It was fragmented. What we're seeing now with generative AI tools is tighter overlap – reviewers, case teams, and partners are working from the same pool of insights. The silos are breaking down, and everyone can contribute to building the narrative earlier.”

Michael Frankel

Counsel, Troutman Pepper

Enhancing Confidence and Strategic Clarity Across the Team

The single biggest intangible benefit generative AI brings to case teams is confidence. When lawyers know their chronologies, summaries, and outlines are not only faster to produce but also backed by clear rationales and document citations that can be verified, they can trust the foundation of their case strategy.

Instead of second-guessing whether something important was overlooked, teams can focus on what matters most: how the facts fit together, how to anticipate opposing arguments, and how to sharpen their narrative for the court or their client. With generative AI as a reliable partner, the work shifts from worrying about completeness to confidently refining strategy, turning uncertainty into clarity.

“Clients are already asking how we’re using AI to handle their matters more efficiently. They expect it.”

Partner

AmLaw 100 Firm

Relativity aiR for Case Strategy: Empowering Global Case Teams with Generative AI

Relativity developed aiR for Case Strategy specifically to enhance strategic clarity, efficiency, and collaboration across case teams, regardless of jurisdiction.

Built in close collaboration with experienced lawyers, aiR for Case Strategy streamlines crucial yet tedious elements of case preparation and strategic analysis, enabling lawyers and case teams to move from reactive to proactive case management. At its core, the solution automates repetitive tasks, centralizes key case information, and rapidly surfaces critical insights – empowering lawyers, paralegals, and litigation support professionals to develop stronger, more coherent narratives earlier in the litigation lifecycle.

The screenshot displays the Relativity aiR for Case Strategy interface. On the left, a 'Fact Navigator' shows a timeline of facts from February to April 2017. The main panel shows a detailed view of a fact: 'Robert Williams received a Rolex watch from BigThorium.' The fact is dated Mar 12, 2017, 12:00 AM. The description states: 'Robert Williams, the City Treasurer of Atlantis, received a Rolex watch from BigThorium on March 12, 2017, which he described as a token of appreciation for being considered for the municipal energy project contract.' The interface also shows 'Citations (5)', 'aiR Issues' (Bribery, Intent to bribe, Knowledge), 'aiR Entities' (Robert Williams, John Maxwell, Sarah Thompson, BigThorium), and a 'Fact Score and Arguments' section with a score of 4. The 'Helpful/Harmful' section is marked as 'Helpful'. The 'Documents (2)' section shows a document titled 'REL000010068' with a description of a deposition transcript.

Purpose-Built Capabilities for Essential Tasks

The benefits of generative AI come to life in aiR for Case Strategy. Built specifically for case development, the tool addresses the points of friction that traditionally slow lawyers down.

1. Faster Identification and Synthesis of Critical Facts

Earlier, we highlighted how time pressure and sprawling data sets can make it feel impossible to find the facts that matter. aiR for Case Strategy rapidly extracts key facts and constructs detailed timelines directly from complex document collections, eliminating redundant manual review and significantly reducing the risk of missing vital evidence.

By enabling teams to grasp the essential facts early, aiR for Case Strategy lays a stronger foundation for confident, proactive decision-making.

The screenshot displays the aiR for Case Strategy BigT interface. The main window is titled "Extract Facts" and contains several sections:

- Matter Overview:** "The following is a discrimination investigation. BigThorium is a company that has been building a new power plant and recruiting workers to help with the project. The company is facing allegations of discriminatory treatment and abuse of employees based on their national origin and/or race, as well as retaliation against employees who opposed the company's unlawful conduct. The plaintiffs (Arvind Patel and Muhammad Kumar) are former employees of BigThorium."
- What are you trying to prove?:** "Our goal is to demonstrate that BigThorium is guilty of racial discrimination against its employees, and that it retaliated against whistleblowers. We also aim to prove that BigThorium lured employees with prospects of citizenship, and then coerced them into staying by controlling their living conditions."
- Issues:**
 - Disparate Treatment: BigThorium is charged with disparate, discriminatory treatment concerning the workers' terms and conditions of employment.
 - Segregation: BigThorium discriminated against employees by race by enforcing segregated living and/or working conditions.
 - Coercion: BigThorium coerced the employees into staying by controlling their living conditions and underpayment.
- People and Aliases:**
 - William Davis, Director of Operations (Alias: Bill); wdavis@bigthorium.com
 - Francis Ham, CEO (Alias: Frank); fham@bigthorium.com
 - Samantha Jones, Recruiter (Alias: Sam); sjones@bigthorium.com
 - Arvind Patel, Welder; apatel@bigthorium.com
 - Muhammad Kumar, Welder; mkuman@bigthorium.com
- Noteworthy Organizations:**
 - BigThorium: The company where all these persons were involved, which required new job positions to be filled and faced issues related to worker complaints, housing, security, and monitoring of workers' emails.
 - CNCinCareers: Recruitment company hired by BigThorium to find skilled workers for the power plant project.
 - GNS Partners: Law firm where Natasha Green is employed as an attorney representing Francis Ham.
- Additional Context:** "The plaintiffs (Arvind Patel and Muhammad Kumar) were the whistleblowers who brought this matter to light."
- Document Summary Instructions:** "The document summary should be two paragraphs long, containing no more than 200 words. Even if the document is an email thread, the summary should be in chronological order. It should provide an overview of the document, and should focus on the following:
 - All the key players mentioned in the document and their roles.
 - A date range for the document, if any."

At the bottom of the window are buttons for "Extract Facts", "Save and Close", and "Cancel".

On the right side of the interface, there is a "Fact Documents" table with columns for "Citation" and "Fact". The table shows two entries for "RELO000000237" with a "Fact" of "2". A "Total: 4,090" is shown at the bottom right of the table.

2. Streamlined Witness and Event Preparation

Deposition and witness prep are some of the most demanding, detail-heavy parts of a case. Preparation for witness examinations, depositions, hearings, and internal or regulatory investigations typically involves intensive manual processes: reviewing lengthy documents, drafting detailed outlines, and cross-referencing evidence.

aiR for Case Strategy produces first drafts of witness summaries and outlines, with citations back to the source evidence. By starting with structure instead of a blank page, lawyers can focus immediately on the most critical issues and supporting materials. AI-generated deposition summaries also help lawyers get up to speed on testimonial evidence, streamlining preparation for future depositions or motion practice.

The screenshot displays the aiR for Case Strategy Q&A interface. The main window shows a document titled "Witness Background" for Sarah Thompson. The document content includes:

Witness Background

Name: Sarah Thompson
 Current Company: BigThorium
 Job Title: VP of Sales
 Work history: VP of Sales at BigThorium, involved in sales strategy, procurement, and stakeholder engagement. [REL000005527, REL000005533, REL000005542, REL000005556]
 Other affiliations: Collaborated with legal counsel and marketing teams on compliance and public relations strategies. [REL000005501, REL000005531, BTV5_P_000000148]
 Personal relations: Direct professional interactions with John Maxwell, Kayla Fry, Robert Williams, and other BigThorium employees. [REL000005527, REL000005533, REL000005556, REL000005549]

Witness's Involvement to the Matter

1. Summary
 VP of Sales at BigThorium. Discussed ethical boundaries for client gifts. Purchased Rolex for Robert Williams. Coordinated proposal strategy for Atlantis contract.

2. All entities this witness was associated with
 John Maxwell: Collaborated on proposal strategies and ethical discussions.
 DocIDs: REL000005527, REL000005533, REL000005542
 Robert Williams: Recipient of Rolex watch purchased by Sarah Thompson.
 DocID: REL000005529, REL000005556

The interface also shows a sidebar with navigation options and a list of documents at the bottom.

3. Enhanced Collaboration Through Centralized Case Intelligence

RelativityOne provides a single, secure environment for case development — and aiR for Case Strategy is where the team comes together. Evidence, transcripts, summaries, and chronologies live in one workspace, eliminating silos and ensuring everyone works from the same, up-to-date intelligence. AI surfaces and organizes the insights that matter most, but it's the case team's judgment, strategy, and legal expertise that transform those insights into arguments.

The screenshot shows the RelativityOne interface with a video transcript and a comments section. The transcript text is as follows:

6 your concerns about the procurement process?
 7 They assured me that the **Rolex** was just a token of appreciation and emphasized their
 8 commitment to a
 9 fair evaluation.
 10 Can you elaborate on how the BigThorium legal team addressed your concerns about
 11 ethical practices during
 12 the meeting?
 13 They explained the ethical guidelines and how they would ensure compliance throughout
 14 the process.
 15 Did you feel that the discussions during the meeting were transparent and focused on
 16 maintaining integrity
 17 in the procurement process?
 18 Yes, I felt the discussions were transparent.
 19 What steps did BigThorium propose to take in order to ensure compliance with ethical
 20 guidelines during
 21 the procurement process?
 22 **They proposed regular check-ins with legal counsel to ensure adherence to ethical
 23 standards.**
 24 After your meeting with BigThorium's team, did you feel that your concerns about potential
 25 bribery were
 26 completely resolved?
 27 Yes, my concerns were resolved.
 28 How did your perception of the integrity of the procurement process change after your
 29 discussions with BigThorium's
 30 team?
 31 I felt more confident in the integrity of the process.

The comments section on the right shows a comment from "ME" at 8:17 PM: "Do we know how frequent these check-ins occurred?" A blue line connects this comment to the highlighted text in the transcript.

By pairing AI-driven efficiency with human intelligence, teams collaborate more effectively across investigations, depositions, and trial prep. The platform isn't just a repository of information – it's the central hub that drives coordinated, high-impact litigation work. With editable facts, summaries, and outlines available to the entire team, aiR for Case Strategy provides a true single source of truth, supporting alignment, real-time collaboration, and consistency across geographies and functions.

4. Uncovering Strategic Insights and Hidden Connections

aiR for Case Strategy leverages advanced generative AI technology to identify entities, relationships, and strategic connections that manual review or keyword searches often overlook. By automatically surfacing these hidden insights, litigation teams are better equipped to anticipate opposing arguments, identify potential risks, and capitalize on opportunities – significantly improving their overall strategic position.

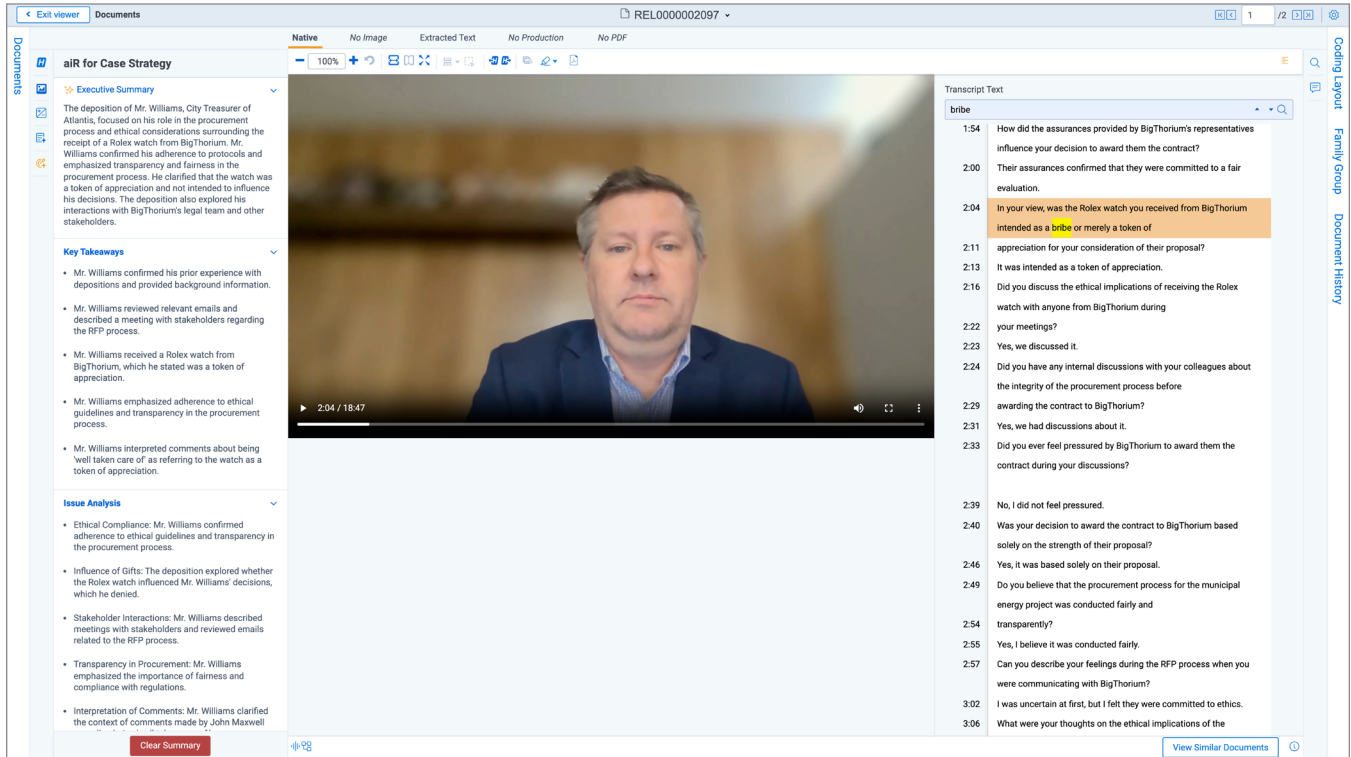
The screenshot displays the aiR for Case Strategy Demo interface. At the top, there's a search bar and navigation tabs for Facts (190), Issues (5), and Entities (28). A central timeline view shows various facts from February to April 2017, with colored circles indicating relationships between entities like RW, JM, ST, B, CO, and BR. A detailed view of a fact is shown on the right: "Robert Williams received a Rolex watch from BigThorium." This view includes a description, citations, and related issues/entities. The left sidebar contains filters for Fact Score (4, 3, 2, 1) and Issues (Any text, Bribery, Intent to bribe, Knowledge, Unethical communications, Entities).

5. Build Your Case, Not Your Workload

Much of what slows down case development isn't the strategy itself – it's the grind. aiR for Case Strategy automates repetitive but critical tasks, giving lawyers more capacity to focus on what matters: crafting arguments, preparing witnesses, and sharpening trial strategy. The result is more bandwidth for the case team to do the high-value work only they can do.

6. Uncover the Story Behind the Evidence

Managing documents is only half the battle; making sense of them is where strategy is won. aiR for Case Strategy surfaces the critical facts, key players, issues, and supporting exhibits that bring clarity to the case. Chronologies anchored in the evidence give teams the structure they need to build arguments, anticipate questions, and challenge assumptions with confidence. Add in AI-powered deposition summaries that help highlight inconsistencies, and aiR for Case Strategy empowers case teams to not just track what the evidence says, but shape the story behind it.



Real-World Benefits for Legal Teams

From Hours to Minutes: Page One Legal & Cummins Transform Case Prep with aiR for Case Strategy

Chicago-based firm, Cummins Law LLC, faced a fast-moving financial services matter with dozens of 200–300+ page deposition transcripts that needed to be summarized and analyzed under tight deadlines. Manual review was slow, costly, and resource-intensive, while inaccurate AI summaries from the court reporting service didn't help, leaving the firm struggling to keep pace.

Partnering with Page One Legal and Bright Line Counsel, Cummins adopted Relativity aiR for Case Strategy to automate transcript analysis. Within minutes, aiR extracted accurate, defensible facts — enabling attorneys to focus on strategy instead of summary.

“We went from spending hours per transcript to extracting key facts within minutes. Our confidence grew quickly once we saw that aiR for Case Strategy consistently surfaced the same core insights we would have found manually.”

Andrew Milauskas

COO, Page One Legal

Fast facts are exciting, but the real magic happens in validation.

The results were immediate – and measurable.

The team saved several hours of attorney time per transcript, amounting to thousands of hours in savings on a single matter.

- **Time Savings:** aiR for Case Strategy enabled the team to pull the necessary and important facts together 70% faster, so attorneys had to spend less time and money extracting facts – focusing their billable hours on moving the case forward instead.
- **Cost Efficiency:** Thousands of dollars saved on this single matter.
- **Strategic Focus:** Attorneys shifted from summarizing transcripts to making decisions.
- **Greater Collaboration:** Junior attorneys – freed from their summarizing duties – joined higher-value strategic discussions, while senior attorneys gained immediate visibility into critical facts and trends.
- **Scalability:** aiR for Case Strategy prevented bottlenecks when multiple transcripts came in at once.

To learn more about how Cummins + Page One leveraged aiR for Case Strategy see the full story [here](#).

Conclusion: Transforming Litigation with Generative AI

Every lawyer knows the difference between walking into court prepared and walking in hoping you didn't miss something. Generative AI tilts that balance. With aiR for Case Strategy, you walk in knowing the record, knowing the story, and knowing you've pressure-tested it all. That's not just technology – it's the edge every litigator is looking for.

And the reality is this: generative AI isn't the future of litigation – it's here, it's working, and it's already changing how strategy is built. The question isn't whether you'll use it, but whether you'll lead with it. With Relativity aiR for Case Strategy, your team can move faster, argue smarter, and win more confidently.

See aiR for Case Strategy in Action

Join the firms already transforming their litigation strategy with Relativity aiR for Case Strategy. [Request a personalized walkthrough](#) and see what smarter case strategy looks like in practice.



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