Cassie Oates

Director of Litigation Discovery

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Cassie Oates has a decade of experience working with software experts in large and small-scale software failure litigation. Her litigation experience includes arbitration, bench trials, and jury trials; Ms. Oates offers expertise in document review, fact witness interviews, change management, and testing best practices. As a small-business owner prior to her specialization in litigation, Ms. Oates experienced first-hand the challenges of converting old database management into a modern CRM system. That, coupled with watching an SAP implementation fail because of poor change management practices at the corporate level, has given Ms. Oates unique insight into the customer side of software failure.

In addition to her work in litigation discovery, Ms. Oates specializes in deposition and testimony preparation for arbitration and trial.

Education

Bachelors of Music, Music Education, Magna Cum Laude
Augusta State University, Augusta, Georgia | 1995–1997
National Honor Society, Phi Kappa Phi, Delta Omicron Music Fraternity

Music Education
Converse College, Spartanburg, South Carolina | 1992–1995

Project Management and Complex Problem Solving

- Ability to trouble-shoot in the moment, assess, and mitigate risk including those related to interpersonal relationships and challenges in organizational change management.
- Understand pressures of meeting a payroll, hiring and firing personnel, and organizational change. Managed expense reports and travel expenses.
- Instrumental in the design and acceptance testing of a customer relationship management (CRM) tool.
- Comfortable with all levels of vendor management, including requests for proposal, negotiations, contracting, accounts payable/receivable and invoicing.
- Comfortable with celebrity and near-celebrity interaction including managing “C” suite politics.

Litigation Support

- Success working for a challenging pre-eminent academic and courtroom voice in the field of software failure. Helped uncover the story and identify key facts for both plaintiff and defendant; both customer and integrator.
- Identified the most important documents among tens of thousands in a project's lifecycle to highlight the narrative of what happened in a software implementation for an arbitrator, judge or jury. Able to recognize project-critical documents which have been omitted.
- Assisted in expert witness deposition and trial preparation. Assisted in creating interview questions as well as conducting client/percipient witness interviews and site visits. Promoted from litigation assistant to fact witness interviewer
- Handled and interpreted discovery research, beginning from contract and complaint, and narrowing down to key personnel's relevant emails, project plans, and steering committee minutes. Developed tracking methods for value of project management documents. Understand the difference between usable facts presented in project tracking as opposed to "rosier than actual" or misleading, unusable metrics. Specific expertise includes:
    - Solid understanding of project WBS, timeline as well as critical path planning and analysis.
    - Working knowledge of project and phase estimation using the COCOMO II software cost estimation model.
    - Experience with project success and failure using various methodologies including waterfall, agile, and hybrid, as well as testing phase-specific methodology. Ability to compare resource skills to expected contractual resource deliverables and the job needs.
    - Ability to read error logs, identify test issue trends, identify recurring issues and assess the efficiency of fixes.
- Wrote, edited, and provided feedback for expert reports and rebuttal reports.

Records Management

- Effectively managed 100,000+ documents with millions of pages for large-scale system failure litigation matters, including capturing and maintaining key passages from hundreds of documents to be used in expert reports.
- Efficiently summarized hundreds of pages of deposition to isolate key points which led to critical facts for the expert report.
- Organized expert report drafts including references and external support backing up customer and integrator history.
- Comfortable collaborating with counsel and customer representatives to appropriately access Sharepoint and internal legacy document management software. Developed a method to track video game samples; established budget procedures for sales staff.
- Adroit adopter of new technology.

Litigation Consulting

- **Stemilt Growers v. Westernacher Consulting** | Sept 2026–Present
  Jurisdiction: CPR Dispute Resolution (Arbitration)
  Case Number: G-26-73-FH
  Counsel: Corr Cronin LLP
  Nature of Suit: Breach of Contract
  Technology: ERP Software
- **Confidential Blockchain Platform Arbitration** | June 2026–Sept 2026
  Forum: Singapore International Arbitration Centre (SIAC)
  Counsel: Linklaters LLP
  Nature of Suit: Arbitration
- **Belvac Production Machinery, Inc. v. Adonis Acquisition Holdings LLC** | May 2026–Aug 2026
  Jurisdiction: U.S. District Court for the District of Delaware
  Case Number: 1:25-cv-00166
  Counsel: McGuireWoods LLP
  Nature of Suit: Copyright
- **Confidential International Commercial Arbitration** | Apr 2026–Present
  Forum: ICC International Court of Arbitration
  Counsel: Chiomenti Studio Legale
  Nature of Suit: Breach of Contract
- **Confidential Social Media Platform v. Confidential Infrastructure Vendor** | Apr 2026
  Nature of Suit: Breach of Contract
  Technology: Data Center Design
- **The Regents of the University of California v. Linea Solutions, Inc., et al.** | Feb 2026–Present
  Jurisdiction: Superior Court of California, County of Alameda
  Case Number: 23CV056879
  Counsel: Wilson Elser Moskowitz Edelman & Dicker LLP
  Nature of Suit: Breach of Contract
- **Keller Holdings LLC and RLDGROUP v. Automattic Inc., and Matt Mullenweg** | Nov 2025–Present
  Jurisdiction: U.S. District Court for the Northern District of California
  Case Number: 3:25-cv-01892
  Counsel: Schubert Jonckheer & Kolbe LLP, Tycko & Zavareei LLP
  Nature of Suit: Class Action
- **Originate Inc. v. Mauro Archer & O'Neill LLP, et al.** | Oct 2025–Mar 2026
  Jurisdiction: U.S. District Court for the Northern District of California
  Case Number: 3:22-cv-07461
  Counsel: Dykema Gossett PLLC
  Nature of Suit: Breach of Contract
- **Linked Inclusion Corp. v. Technology Dynamics, Inc., Cerebral Blue LLC, et al.** | Aug 2025–Feb 2026
  Jurisdiction: Superior Court of California, County of San Diego
  Case Number: 37-2023-00051085
  Counsel: Behmer & Blackford LLP
  Nature of Suit: Trade Secret

- **Chase Global Services v. Protech Solutions Inc.** | July 2025–June 2026
  Jurisdiction: Circuit Court of Pulaski County, Arkansas, Twelfth Division
  Case Number: 60CV-19-739
  Counsel: McDaniel Wolff PLLC
  Nature of Suit: Trade Secret
- **Coupa Software Inc. and LLamasoft LLC v. Optilogic, Inc., et al.** | June 2025–Present
  Jurisdiction: U.S. District Court for the District of Delaware
  Case Number: 1:24-cv-01275
  Nature of Suit: Copyright
- **Deltux Software Company Inc. v. Apptivo, Inc., et al.** | June 2025–Present
  Jurisdiction: Superior Court of California, County of Orange
  Case Number: 30-2021-01195551
  Counsel: Burkhalter Kessler Clement & George LLP
  Nature of Suit: Trade Secret
  Technology: Mobile Apps, Customer Relationship Management (CRM), Geo-Analytics
- **Marriott Vacation World v. Infosys LLC** | Nov 2024–May 2025
  Forum: Judicial Arbitration and Mediation Services (JAMS)
  Counsel: Benesch, Friedlander, Coplan & Aronoff LLP
  Nature of Suit: Breach of Contract
  Technology: IT Managed Services
- **Vimo, Inc. d/b/a GetInsured v. Deloitte Consulting LLP** | May 2024–Mar 2025
  Jurisdiction: Superior Court of California, County of Santa Clara
  Case Number: G-24-7-NA, 22CV405262
  Counsel: Kirkland & Ellis LLP
  Nature of Suit: Trade Secret; Breach of Contract
- **Mudflap, Inc. v. Trucker Path, Inc.** | Apr 2024–Oct 2024
  Forum: Judicial Arbitration and Mediation Services (JAMS)
  Case Number: 5100001313
  Counsel: Carr McClellan P.C.
  Nature of Suit: Trade Secret
- **MIADVG, LLC v. V2Solutions, Inc.** | Sept 2023–Apr 2024
  Forum: American Arbitration Association (AAA)
  Case Number: 01-23-0000-2561
  Counsel: Palmieri, Tyler, Wiener, Wilhelm & Waldron LLP
  Nature of Suit: Breach of Contract
- **dmarcian, Inc. v. DMARC Advisor BV** | Aug 2023–Present
  Jurisdiction: U.S. District Court for the Western District of North Carolina, Asheville Division
  Case Number: 1:21–cv–00067–MR
  Counsel: Womble Bond Dickinson (US) LLP
  Nature of Suit: Copyright
- **Confidential Customer v. Confidential Vendor** | July 2023–Sept 2024
  Forum: Judicial Arbitration and Mediation Services (JAMS)
  Case Number: 5450000478
  Counsel: Stinson LLP
  Nature of Suit: Software Dispute; Breach of Contract

- **LKQ Corporation v. Overall Parts Solutions** | July 2023–Nov 2024
  Jurisdiction: Delaware Court of Chancery
  Case Number: 2022-0036
  Counsel: Jones Day
  Nature of Suit: Breach of Contract
- **WIPRO Limited v. First Data Government Solutions, LP** | July 2023–Present
  Jurisdiction: U.S. District Court for the District of Nebraska
  Case Number: 4:22-cv-03116-JMG-MDN
  Counsel: IMS Consulting & Expert Services
  Nature of Suit: Breach of Contract
- **AlmondNet Inc. v. Amazon.com Inc. |** July 2023–June 2024
  Jurisdiction: U.S. District Court for the Western District of Texas
  Case Number: 6:21-cv-00898-ADA
  Counsel: Russ August & Kabat
  Nature of Suit: Patent
- **Best Ring, LLC v. Ronin POS, LLC** | June 2023–Present
  Jurisdiction: U.S. District Court for the Western District of Texas, Waco Division
  Case Number: 6:22-cv-00766-ADA
  Counsel: Naman, Howell, Smith & Lee, PLLC
  Nature of Suit: Patent; Copyright; Trade Secret
- **K+S Potash Canada General Partnership v. Veolia Water Technologies Inc.** | Mar 2023–Present
  Jurisdiction: Court Of Queen's Bench For Saskatchewan
  Case Number: QB No. 817 (filed 2018)
  Nature of Suit: Breach of Contract
  Counsel: Stikeman Elliott LLP
  Technology: Plant Design Management Systems (PDMS), Clash Detection, Database synchronization
  Expert Role: Electronic Discovery and Document Review Lead
- **FastTrac Transportation, LLC v. Pedigree Technologies, LLC** | Jan 2023–Jan 2025
  Jurisdiction: U.S. District Court for the District of North Dakota
  Case Number: 3:22-cv-00053-PDW-ARS
  Counsel: Shackelford, Bowen, McKinley & Norton, LLP
  Nature of Suit: Breach of Contract
- **OpenText Corporation v. Softail, Inc.** | July 2022–Mar 2023
  Forum: American Arbitration Association (AAA)
  Case Number: AAA 01-22-0001-8608-20361
  Counsel: Vedder Price
  Nature of Suit: Breach of Contract
- **ClubReady LLC v. Xponential Fitness** | June 2022–Jan 2024
  Forum: American Arbitration Association (AAA)
  Case Number: AAA 01-21-0017- 8081-20347
  Counsel: Willkie Farr & Gallagher LLP
  Nature of Suit: Breach of Contract
- **1-800 Hansons LLC v. Rightpoint Consulting LLC** | May 2022–Sept 2022
  Jurisdiction: American Arbitration Association
  Counsel: Honigman LLP
  Nature of Suit: Breach of Contract

- **Truinject Corp. v. Nestle Skin Health, S.A.** | Apr 2022–June 2023
  Jurisdiction: U.S. District Court for the Eastern District of Texas
  Case Number: 4:20-cv-457
  Counsel: Kasowitz Benson Torres, LLP & Beus Gilbert McGroder, PLLC
  Nature of Suit: Breach of Contract
- **FinancialApps, LLC v. Envestnet, Inc. and Yodlee, Inc.** | Mar 2022–Present
  Jurisdiction: U.S. District Court for the District of Delaware
  Case Number: 1:19-cv-01337
  Counsel: Kasowitz, Benson & Torres LLP
  Nature of Suit: Trade Secret; Copyright
- **JK Soft, Inc. v. Innoas, Inc.** | Feb 2022–Present
  Jurisdiction: U.S. District Court for the District of New Jersey
  Case Number: Civil Action Number: 2:18-cv-00199 (WJM)(MF)
  Counsel: Choi Law Group
  Nature of Suit: Trade Secret; Copyright
- **Ventive LLC v. Title Pipe, Inc.** | Nov 2021–Feb 2022
  Jurisdiction: American Arbitration Association
  Counsel: Mooney Wieland
  Nature of Suit: Breach of Contract
- **Appian Corporation v. Pegasystems, Inc. & Youyoung Zou** | Aug 2021–Jan 2022
  Jurisdiction: Circuit Court of Fairfax County, Virginia
  Case Number: 2020-07216
  Counsel: Choate Hall & Stewart LLP
  Nature of Suit: Trade Secret; Copyright
- **Mueller Supply Company, Inc. D/B/A Mueller, Inc. v. JNL Steel Components, Inc. and Web Plant Media, LLC** | July 2021-Feb 2023
  Jurisdiction: U.S. District Court for the Northern District of Texas, San Angelo Division
  Case Number: 6:21-cv-00036-H
  Counsel: Foley and Lardner LLP
  Nature of Suit: Trade Secret; Copyright
- **Manipal Education Americas, LLC v. Campus Management Corp.** | Sept 2020-Apr 2021
  Jurisdiction: American Arbitration Association
  Case Number: 01-19-0003-0449
  Counsel: Egozi & Bennett, P.A.
  Nature of Suit: Breach of Contract
- **Commonwealth of Pennsylvania, Dept. of Labor and Industry v. International Business Machines Corp.** | July 2019–Oct 2021
  Jurisdiction: Court of Common Pleas of Dauphin County, Pennsylvania
  Case Number: 2017-cv-1740
  Counsel: Jones Day
  Nature of Suit: Breach of Contract
- **ECI Software Solutions, Inc. v. John Plyler Plumbing and Hardware, Inc.** | Aug 2019–July 2020
  Jurisdiction: U.S. District Court for the Northern District of Texas, Dallas Division
  Case Number: 3:18-cv-02758-S
  Counsel: Greenberg Traurig, LLP
  Nature of Suit: Trade Secret; Copyright

- **Toms Shoes v. Infosys** | Mar 2018–Apr 2018
  Forum: Private Mediation
  Nature of Suit: Breach of Contract
- **American Type Culture Collection v. Armanino, LLP** | Feb 2018–Mar 2018
  Jurisdiction: U.S. District Court for the Eastern District of Virginia, Alexandria Division
  Case Number: 1:2017cv01235
  Counsel: Holland & Knight LLP
  Nature of Suit: Breach of Contract
- **Iowa Workforce Development** | Mar 2018–July 2018
  Counsel: Special Litigation Division, Office of the Attorney General of Iowa
  Nature of Consultation: Discussion of Breach of Contract
- **Electronic Transaction Consultants Corporation v. Miami-Dade County Expressway Authority** | Mar 2017–Oct 2017
  Jurisdiction: Circuit Court of the Eleventh Judicial Circuit, Miami-Dade County, Florida
  Case Number: 12-46272CA10
  Counsel: Vezina, Lawrence and Piscitelli
  Nature of Suit: Retrial of Breach of Contract
- **America's Collectibles Network, Inc. d/b/a Jewelry Television v. Sterling Commerce (America), Inc.** | Feb 2016–May 2017
  Jurisdiction: U.S. District Court for the Eastern District of Tennessee at Knoxville
  Case Number: 3:09-cv-143
  Counsel: Kilpatrick Townsend
  Nature of Suit: Breach of Contract
- **H.B. Fuller Corp. v. Accenture, LLP** | Mar 2015–Aug 2015
  Jurisdiction: American Arbitration Association
  Counsel: Bowman & Brooke/ Fredrikson & Byron, P.A.
  Nature of Suit: Breach of Contract
- **Xerox State and Local Solutions, Inc. f/k/a ACS State & Local Solutions, Inc. v. Xchanging Solutions USA, Inc. f/k/a Albion, Inc. and Xchanging Solutions Limited f/k/a Cambridge Solutions Limited** | Nov 2014–May 2015
  Jurisdiction: U.S. District Court for the Southern District of New York
  Case Number: 13 Civ. 3472 (LLS)
  Nature of Suit: Breach of Contract

Presentations

- **"*It's not just about the estimate. It's about the ESTIMATE!*"**
  Co-presented with Warren S. Reid: a USC Graduate Software and Systems Engineering Course | Nov 2017
- **"*The Economics of Software*"**
  Co-presented with Warren S. Reid: a USC Graduate Software and Systems Engineering Course | Nov 2016
- **"*Catastrophe: COCOMO and the Courtroom*"**
  Assisted Warren S. Reid in presenting: a USC Graduate Software and Systems Engineering Course | Oct 28, 2015

Professional Experience

Quandary Peak Research
Director of Litigation Discovery | Los Angeles, CA | May 2023–Present

The Engine, Inc.
Litigation Consultant | Los Angeles, CA | Apr 2018–May 2023

WSR Consulting Group, LLC
Senior Litigation Consultant, Legal Analyst | Los Angeles, CA | 2014–Apr 2018

- Responsibilities included critical review of 100,000+ documents containing more than a million pages to track down "hidden" documents and emails supporting the expert report and the legal case map.

Wildbrain Entertainment
Assistant to Legal Counsel | Los Angeles, CA | 2011–2012

THQ
Executive Assistant to Online Gaming | Agoura Hills, CA | 2009–2011

ACME Comedy Theatre
Owner/Administrator | Los Angeles, CA | 2004–2008

- Managed and oversaw all operations for a seven-day-a-week, 40+ weekly shows, 99-seat live theater in Los Angeles. Focused on delivering the best possible customer experience – both internally with the actors performing (150+ actors, 150+ students attempting to join our companies) and externally with the theatergoing public.

Sutton, Barth & Vennari
Executive Assistant | Los Angeles, CA | 1998–2004

Skills

Apps
Microsoft Word, Excel, PowerPoint, QuickBooks, Access, Adobe Acrobat, Practice Engine (Client Management Software), Costar, MS Project