



CUSTOMIZED EDISCOVERY APPROACH PROVIDES REPEATABLE SOLUTIONS

TERIS CASE STUDY

A large national healthcare management company with 46,000 employees and more than 30 locations nationwide came to TERIS requesting document management services and litigation support. In particular, the company wanted to know what efficiencies could be provided for all of its ESI needs from one single vendor.

TERIS has managed the procedures and best practices of all aspects of eDiscovery from information management and identification, legal holds and collection to production, as well as overseeing outside counsel. By identifying and leveraging efficiencies that could be implemented throughout the lifecycle of a case, TERIS has saved the client more than \$2 million in one year and reduced review time by 41 percent.

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Prior to working with TERIS, the company employed several law firms and dozens of third parties, but had no repeatable processes for collection, data reduction or review strategy. It had also not identified best-of-breed review platforms or documented any review best practices. With multiple law firms managing their work independently, there was no continuity between matters and a large cost gap.

The company was outsourcing all litigation and eDiscovery to outside counsel. They recognized the benefit of making it a business unit they could manage, yet still outsource and control.

The company realized there were several key problems with this approach:

- Every case was run different. All aspects of litigation and eDiscovery were outsourced to outside counsel per matter and each was run differently.
- There was no clearly identified process or procedure. Inside legal counsel had no available tools to track any aspect of a case, nor properly scope it. This included data identification, acquisition, legal holds, interviews, collections, data assessment, case scoping, data processing, data hosting, data productions, production protocol negotiations, data request proposals, etc.
- Best practices were not available nor being followed.
- Costs were escalating and becoming quickly unpredictable.
- There were no repeatable or scalable solutions available.

TERIS spent several weeks identifying and assessing existing practices and solutions, then deployed a series of point solutions for immediate resolution. These included a web-based legal hold tool and collection services that ranged from actual onsite to remote collections. TERIS also trained staff to perform collections themselves.

TERIS also provided a project management and tracking solution to automate each piece of data throughout the lifecycle of a case. Tools inside one of the hosting solutions allowed TERIS to take a deep dive into any aspect of the data, including custodians, user profiles, frequent flyers, and use their data in multiple cases without having to recollect.

TERIS provided a completely customized approach and full suite of tools that covered every aspect of the EDRM model, including traditional services. TERIS has the experience and bandwidth to identify and offer multiple tools and solutions for each phase of a case. This allows for 100 percent customization per case, yet provides flexibility to adapt to the client's multiple outside counsel.

The entire process for the health care company is now documented, repeatable and deployed for every matter. TERIS has secured a two-year service provider agreement to assist in the management of cases from a technology and review standpoint. TERIS is interacting directly with outside and inside counsel and replicating that process across all matters.



CONCLUSION

The client now has a completely repeatable process and solution that offers custom case management, as well as complete data tracking, work product management and legacy case information readily available.

As a result, the client saved more than \$2 million in one year (2010 vs 2011) and review time was reduced by 41 percent across all matters.

By thoroughly understanding the client's immediate short-term and long-term needs and goals, TERIS was able to offer a customized approach that has point, yet repeatable, solutions for maximum value with minimum overhead.



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