



BUILDING A SCALABLE AND DEFENSIBLE LEGAL HOLD PROGRAM



Situation

A Fortune 100 global technology company sought to build a scalable and defensible legal hold program to support its increasing litigation portfolio and rising data preservation demands. The company had matured past its home-grown legal hold system and required expert guidance and support to replace it with leading technology and build supporting processes to manage its global preservation efforts.

Solutions

Our professionals:

- Implemented a cloud-based legal hold and discovery workflow management solution and integrated it with HR, matter management and email archive systems.
- Created standardized processes that balanced the department's requirements with industry best practices in order to enhance and streamline the issuance of legal holds and submission of data preservation requests to IT.
- Defined and executed a custom data migration strategy to systematically extract legal hold data from the legacy SharePoint system and format it for ingestion into the new platform.
- Worked with local counsel to create geographic-specific legal hold templates and protocols to improve and monitor custodian compliance.
- Defined tracking and reporting workflows to enable the company to measure the timeliness of collection in each geographic region.



- Conducted hands-on training for more than 50 attorneys, paralegals, collection specialists and IT support resources and created training tutorials, quick reference guides and videos.

Benefits

The company transformed its legal hold program into a mature operation that enabled it to defensibly apply a consistent framework across geographies, while providing a foundational platform supporting the legal and IT departments' collaborative efforts to preserve and collect data in a timely manner. As a result, the company is better positioned to scale and meet future demand and train new support resources as needed.