

# Managing E-Discovery Projects

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*LitWorks™ Lunch -n- Learns On-Demand Training Series*

[www.litworks.net](http://www.litworks.net)

## Participant Training Guide

### Learning Objectives:

#### Lesson 1

1. Define Electronic Discovery
2. Define Terms via the EDRM

Electronic Data Discovery or “EDD” is a comprehensive term used to describe the acquisition and use of electronic data in the litigation discovery process (a.k.a. “ESI”)

*List types of electronic information formats that are discoverable:*

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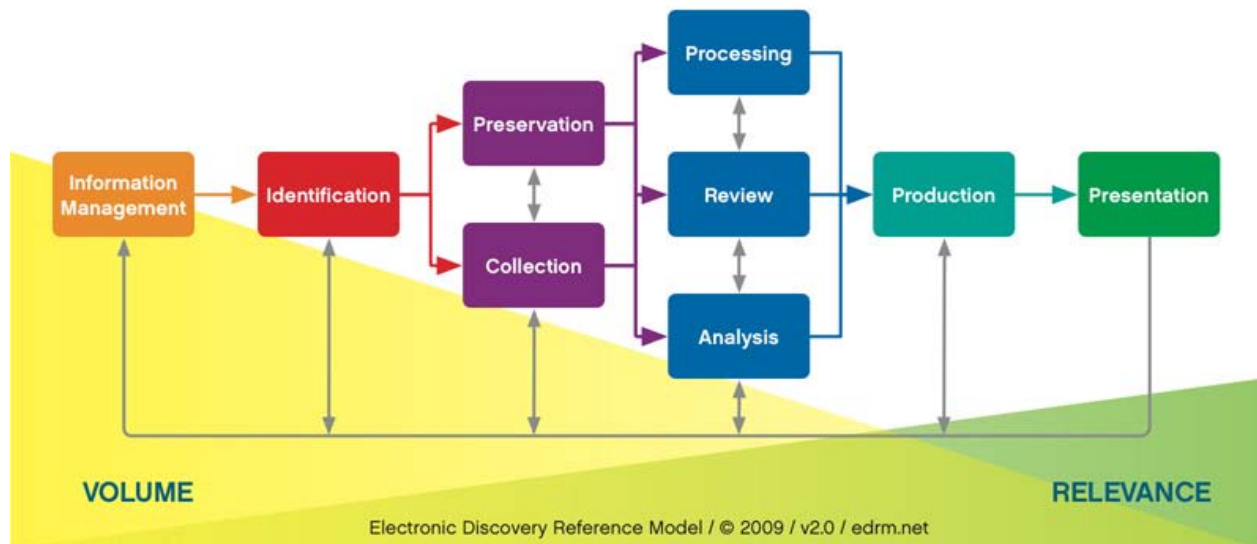
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## Electronic Discovery Reference Model



### Terms you should know

**Preservation** consists of ensuring that ESI is protected against inappropriate alteration or destruction.

**Collection** means gathering ESI for further use in the e-discovery process (processing, review, and so on).

**Processing** is converting electronic files and emails to their native format or an image format as well as extract any metadata or text that is contained within the native files.

**Review** is the evaluation of ESI for relevance and privilege. This step almost always takes place after identification, preservation, collection and processing, and before production.

**Production** - Delivering ESI to others in appropriate forms, using appropriate delivery mechanisms.

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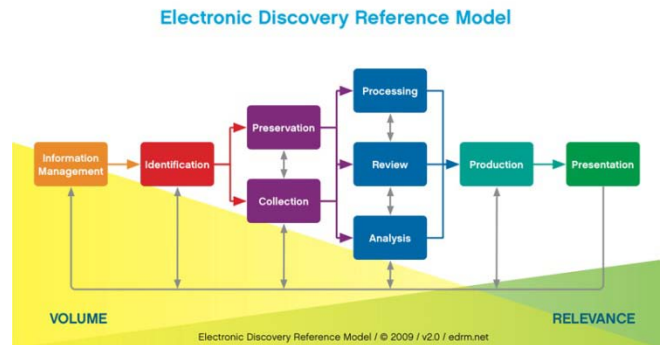
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## Participant Training Guide

## Learning Objectives:

### Lesson 2

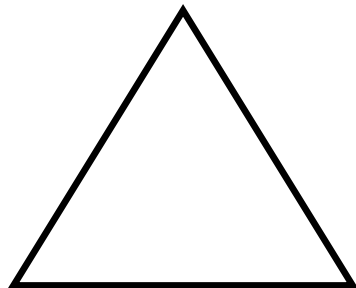
1. Discuss Project Management for EDD
2. Identify Best Practices for Project Success



What does it mean to manage the whole case?

How is managing the entire case different than a project?

A project is a unique effort with a defined beginning, a defined end, specific deliverables, and defined resources.



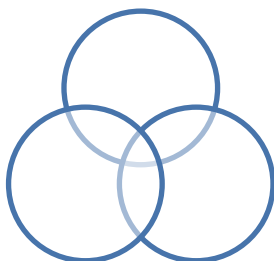
## What are the Parts of the Plan?



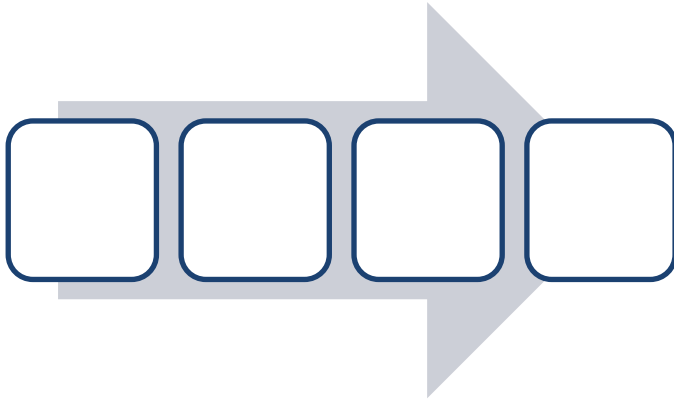
## Why Does Project Management Matter?

- **Set standardization in practice**
  - Reduces risk
  - Reduces start up
  - Reduces cost
  - Encourage cost sharing
- **Technology leveraging**
  - Current firm software may not support large cases (or not support them well)
- **Encourages workflow leveling**
  - Within office locations
  - Across office locations
- **Metrics and statistics for marketing purposes**

## Team Based Project Management



## **Identify the 4 Stages of E-Discovery Project Management**



*Remember: The Tools are NOT as IMPORTANT as the PROCESS*

### **EDRM PM Framework**

Success = open communication

Success = honest discussion

Success = accuracy in project status reporting

Success = better decision making

*Thank you for your participation in  
today's training program!*

Additional resources and information may be found at [www.litworks.net](http://www.litworks.net)