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Managing Small to Mid-size Clients and Matters

Panelists:

Gail Absi, Absi Legal Technology, LTD

Rich Cohen, Renew Data

Sue Kaiser, Jones Day

Nate Latessa, Inventus Technologies, LLC

Moderator:

Nicole Randall, Porter Wright Morris & Arthur LLP

Electric Discovery Consulting with Clients

- Benefits of providing consulting services prior to litigation
- How to approach clients about preparing for possible electronic discovery
- What topics should be discussed with clients
- Desired outcomes of consulting services

Electronic Discovery Planning Session(s):

- Who is involved in the planning sessions
- Factors unique to smaller cases
- Importance of conferring with the other side
- When to get the judge involved

Identifying and Narrowing the Scope of Collection

- Identifying “low-hanging fruit”
- Limit the number of custodians
- Use Key terms (must get agreement from opposing counsel)
- Limit the date range
- Limit the collection to certain file types
- Deduplication
  - Globally
  - Custodian

Products designed for smaller e-discovery matters

- Fios on Request
- ReNew data “Netflix” approach
- Clearwell
- Capabilities of Law firm to handle processing in-house
- Electronic discovery consultants
- others