



Legal Counsel

## **Best Practice Forms, Systems and Processes for Litigation Support Operations**

### Best Practices

Best practices can be established using a combination of forms, technology systems and procedures. Below are examples of different types of best practices to consider implementing for a Litigation Technology department.

#### Forms:

Often times information is recreated for repetitive tasks. Forms and templates can be used to provide consistency, speed and accuracy. Some forms to consider include:

Chain of Custody
Interview questions for Identification
Interview Logs
Hold Memos
Collection Logs
Processing Specifications
Review Protocol
Production Specifications
Production Log
Templates and forms for frequently performed Litigation Support tasks: <ul style="list-style-type: none"><li>• processing software templates</li><li>• review tool templates</li><li>• communication templates</li><li>• budget/forecasting forms</li><li>• checklists (project management, quality control, etc.)</li></ul>
Service Level Agreements
Request for Information (RFI)
Request for Proposal (RFP)
Master Service Agreements (MSA)
Standard Confidentiality Agreement

#### Systems:

Systems provide automated processes for managing or performing litigation support tasks. Like forms, systems can be designed to provide consistency, speed and accuracy. Some systems to consider include:

Project Management System
Ticket/Work Order System
Media intake system
Technology Toolkit (text editors, scripting tools, renaming utilities, etc.)
Litigation Technology reference library



Procedures:

Documented procedures and processes can be used to provide consistent results, improve quality and reduce the time it takes to perform some tasks. Procedures also ensure that systems and forms are being used correctly. Some processes/procedures to consider in Litigation Technology include:

Media Intake Procedures
Processing Procedures
Loading Procedures
Communication Procedures
Production Procedures
Quality Control
Troubleshooting Tips
"How Tos" for Litigation Toolkit
Budgeting/Invoice Procedures
Standard Billing code descriptions
User Training Materials
Admin Training Materials