

## Litigation Support Services Template

Identifying a menu of services for your department will help establish boundaries and expectations. This menu can be communicated to the legal team and used as a basis for creating standards and procedures for your department. Below are some services to consider when creating a menu. They are divided into processes, consultation, support, technology and training.

### Processes

Who is responsible for litigation support processes?

Lit Support	Legal Team	Other	Outsource	Don't Offer	Service
					ESI Identification Interviews
					Collection of E-discovery from Clients
					Develop/communicate processing specifications
					Processing E-discovery
					Scanning/Imaging for ALS
					Loading data/images into ALS
					Loading E-discovery into ALS
					Develop strategy for analysis of E-discovery ALS
					Manage and monitor analysis projects for in-house ALS
					Manage and monitor analysis projects for outsourced ALS
					Develop document review protocol for in-house ALS
					Develop document review protocol for outsourced ALS
					Manage and monitor review projects - in-house ALS
					Manage and monitor review projects – outsourced ALS
					Prepare Productions from in-house ALS
					Prepare Productions from outsourced ALS
					Printing/Hard copy productions
					MS Access/SQL database development
					Prepare Trial Presentation Databases
					Overall Project Management
					Initial vendor communication, negotiation and coordination for scanning/OCR
					Initial vendor communication, negotiation and coordination for identification, preservation or collection

Processes, cont.

Lit Support	Legal Team	Other	Outsource	Don't Offer	Service
					Initial vendor communication, negotiation and coordination for processing
					Initial vendor communication, negotiation and coordination for analysis or review
					Initial vendor communication, negotiation and coordination for production or presentation
					Ongoing vendor Communication and coordination for scanning/OCR
					Ongoing vendor Communication and coordination for identification, preservation or collection
					Ongoing vendor Communication and coordination for processing
					Ongoing vendor Communication and coordination for analysis or review
					Ongoing vendor Communication and coordination for production or presentation
					ESI Budgets and Vendor Invoices for scanning/OCR
					ESI Budgets and Vendor Invoices for identification, preservation or collection
					ESI Budgets and Vendor Invoices for processing
					ESI Budgets and Vendor Invoices for analysis or review
					ESI Budgets and Vendor Invoices for production or presentation

Consultation

Consider and identify who is responsible for consulting and advising on various discovery processes.

Lit Support	Legal Team	Outsource	Don't Offer	Service
				Consulting on Information Management with attorneys and/or client.
				Consulting on vendor evaluation/selection for Information Management with attorneys and/or client.
				Consulting on Identification, Preservation or Collection of ESI
				Consulting on vendor evaluation/selection for Identification, Preservation or Collection of ESI
				Attendance at 26F conference
				Consulting on Processing, Analysis and Review of ESI

Consultation, cont.

Lit Support	Legal Team	Outsource	Don't Offer	Service
				Consulting on vendor evaluation/selection for Processing, Analysis and Review of ESI
				Consulting on Production or Presentation of ESI
				Consulting on vendor selection for Production or Presentation of ESI
				Consulting on trial presentation

Support

Identify who is responsible for end user support including troubleshooting and “how do I?” on the processes and tools you are using.

Lit Support	Legal Team	Outsource	Don't Offer	Service
				In-house ALS Support for End-users (Analysis, Review or Production)
				Outsourced ALS Support for End-users (Analysis, Review or Production)
				ESI Support
				Printing/Paper Productions
				Trial databases pre-trial
				Trial in courtroom

Technology

What technology tools do you offer end-users?

Lit Support	Outsource	Don't Offer	Tools
			Scanner(s) and software
			ESI Processing Software
			Internal ALS Analysis system(s)
			Internal ALS review system(s)
			Internal Auto coding Tool
			Internal Near Dedupe Tool
			Internal Thread Analysis Tool
			Internal Conceptual Search Tool
			Internal Clustering Tool
			Internal Early Case Assessment Tool
			Internal Trial Presentation Tool
			Extranets (supported internally)



Training

Identify who is responsible for creating and conducting the litigation support training programs.

Lit Support	Legal Team	Outsource	Don't Offer	Service
				End-user training for document imaging
				In-house ALS End-user Training
				In-house ALS Administrative/Technical Training
				Outsourced ALS End-user Training
				Outsourced ALS Administrative/Technical Training
				E-discovery Training Program for legal team
				E-discovery Training Program for litigation technology
				End-user training for Trial Presentation