



## Setting a New Benchmark for Discovery Management

### Streamlined Discovery Process

A discovery scoping and early case strategy solution, Evidence Optix gives corporate legal teams an organized, repeatable workflow and the insights to make smarter decisions earlier, improve outcomes, and reduce downstream eDiscovery spend.

## The Result :

**Less data.**  
**Lower spend.**  
**Better strategy.**



### More Precise Collections

Cut overcollection and duplicative effort. Reduce the volume and cost of data flowing into expensive review stages.



### Real-time Oversight

Gain visibility into scoping decisions, workloads, efficiency, and spend of outside counsel. Ensure consistent, defensible processes across firms and matters.



### Enhanced Collaboration

Unify in-house legal, IT, outside counsel, and service providers with one shared source of truth.



### No More Spreadsheets

Maintain always-on access to custodians, data sources, decisions, and documentation. No more hunting for the latest version.



### Right-Size Preservation

Identify what matters early. Narrow, realign, and lift legal holds proactively to reduce risk, noise, and cost.

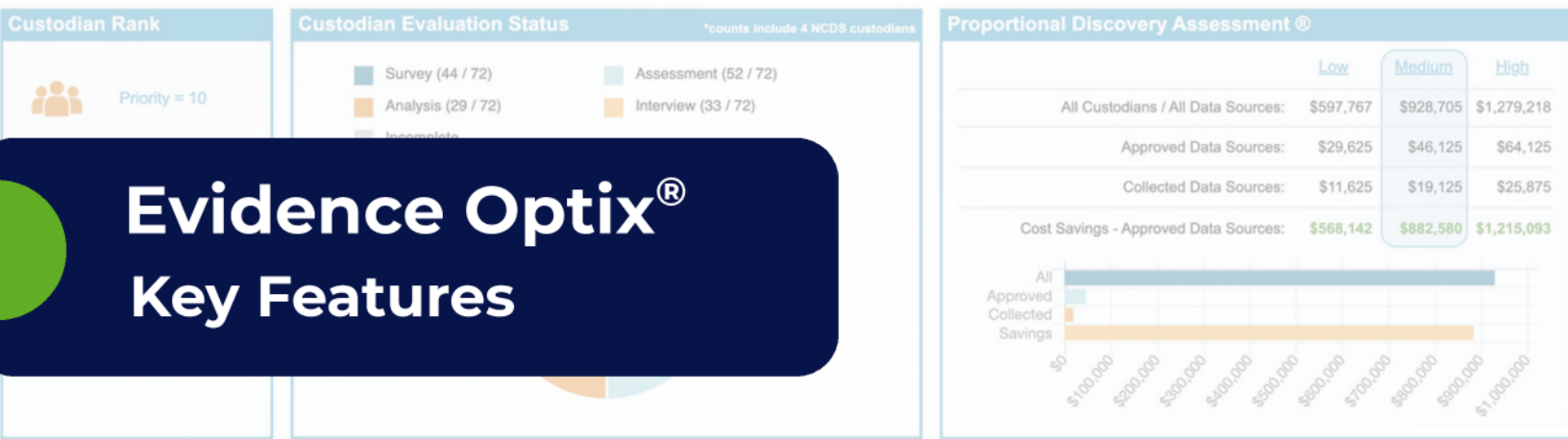


### Relieve Pressure on Stretched Internal Teams

Automate manual processes, streamline scoping, and free in-house resources to focus on strategy, not administration.

**Transform how discovery is scoped, managed, and executed.**

For inquiries, please contact us at [info@insightoptix.com](mailto:info@insightoptix.com).



# Evidence Optix<sup>®</sup>

## Key Features



### Custodian Grouping + Targeted Questionnaires

Segment by role, department, relevance, or priority. Deliver tailored surveys, interviews, and relevancy assessments for more precise scoping.



### Visualizations, Metrics, and Reporting

Heat maps, dashboards, and trend views that strengthen strategy, negotiations, and proportionality arguments.



### Custodian + Data Scoring

Rank custodians on relevancy and assess data source burden to prioritize what is truly important.



### Discovery Cost Management

Real-time cost modeling and scenario planning for budgeting, negotiations, and settle-vs-proceed decision-making.



### Comprehensive Data Source Tracking

End-to-end preservation and collection decisioning workflows with centralized documentation and lifecycle management.

## Use Cases

- Early Case Strategy, Discovery Scoping, and Budgeting
- Meet & Confer / ESI Protocol Development
- Proportionality + Burden Analysis
- Custodian and Data Source Discovery Management
- Realignment + Release of Legal Holds
- Departed Employee / Workforce Reduction / Device Reclamation
- Compliance, Investigations, and Audit Readiness

Take control of discovery before it takes control of your budget.

Contact us to see for yourself: [info@insightoptix.com](mailto:info@insightoptix.com).