



Setting a New Benchmark for Discovery Strategy and Client Service

Streamlined Discovery Process

A discovery scoping and early case strategy solution, Evidence Optix gives law firms a systematic, attorney-driven workflow to guide clients, strengthen arguments, and deliver more efficient, defensible outcomes.

The Result :

Faster Strategy Development.
Stronger Firm Differentiation.
Greater Client Satisfaction.



Reduce Client Spend — Without Reducing Your Value

Shift attorney involvement earlier, limit data volumes, and help clients meet budget expectations — preserving revenue for strategic work.



Gain Visibility into Client Custodian and Data Decisions

Apply clear, defensible rationale for custodian and data source selection, and scope — before collection begins — preventing unwieldy “data dumps.”



Improve Collaboration Across All Stakeholders

Provide clients, IT, and outside vendors a structured workflow, with real-time access to decisions, documentation, and custodial intelligence.



Strengthen Negotiation Position in Meet and Confer

Arm attorneys with the data needed to push back on overly broad requests and negotiate discovery and protocols from a position of strength.



Centralize Documentation for Every Matter

Eliminate scattered spreadsheets and memorialize a defensible historical record of all decisions on custodians and data sources across stakeholders.



Differentiate Your Firm and Deepen Client Loyalty

Demonstrate innovation and alignment to client objectives with a scalable discovery framework that no competitor can match.

Transform how your firm approaches discovery.

Contact us at info@insightoptix.com to learn more.



Evidence Optix[®]

Key Features



Systematic Custodian Evaluation + Targeted Questionnaires

Guide clients through a structured assessment that yields greater insight — and better defensibility.



Custodian Ranking + Burden Scoring

Evaluate relevance, prioritize sources, and make precise, defensible decisions from the outset.



Heat Maps, Dashboards + Data Visualizations

Equip attorneys with real-time metrics to build strategy, support proportionality, and drive negotiations.



Cost Modeling + Scenario Planning

Generate real-time cost projections to support budget discussions, settle-vs-proceed analysis, and strategic planning.



Centralized Data Source Tracking

Track and manage preservation, collection, and data source details across the litigation lifecycle — no more searching for answers.

Use Cases

- Early Case Strategy Development
- Meet & Confer Preparation + ESI Protocol Development
- Proportionality + Burden Analysis
- Cross-Matter Custodian and Evidence Management
- Differentiate Your Firm in RFPs and Client Pitches
- Strengthen National Discovery Counsel Proposals
- Class Action + MDL Discovery Orchestration
- Build Client-Aligned Litigation / Discovery Frameworks

Ready to strengthen client relationships and elevate your discovery practice?

Contact us and we'll show you how: info@insightoptix.com.