

# Why Evidence Optix?

In today's economy, law firms often find themselves trying to balance:

- How to innovatively differentiate the delivery of legal services to retain and expand business in the face of heightened competition
- Pressure from clients to reduce discovery costs while providing highcaliber legal representation
- Scoping and collection done inhouse, leaving outside counsel unable to collaborate and develop early discovery and case strategies
- How to add structure to a historically unstructured and decentralized process while trying to mitigate data loss, errors, and sanctions
- Outdated practices that encourage overcollection versus increasing demands for greater precision in discovery

# How Litigators Can Flip the Script

What if you could present a solution to clients that demonstrates responsiveness to budget and risk concerns, and also creates an opportunity to engage earlier, thereby ensuring an ongoing revenue stream for your firm?

# **Collaborate and Align with Your Clients' Needs**

		Survey (41 / 43)	Assessment (38 / 43)			Low	Medium	High
Priority = 6		Analysis (27 / 43)	Interview (24 / 43)		All Custodians / All Data S	Sources: \$607,500	\$918,500	\$1,696,0
High = 5		Incomplete			Approved Data 8	Sources: \$52,500	\$77,500	\$140,0
Align = 5					Collected Data 8	Sources: \$32,500	\$47,500	\$85,0
Medium =	7				Cost Savings - Approved Data S	Sources: \$555,000	\$841,000	\$1,556,0
Low = 11			43 Custodians		All Approved Collected			
Released	= 10				Savings	Sep Sector Sector Ling	on gan an gan?	an an an an
					P. D. D. C.	·	an an	20
					રે જે જે જે	જે જે જે	9° 9°	5
					5 8 8 8 	4 4 4	er er	5
ata Source Count	by Custodian R	Rank			~~~~~~	~~~~	e e	6 <sup>10</sup>
ata Source Count	by Custodian R		nk High Custodian Rank	Medium Custo		4 4 4	4 4	612
ata Source Count	by Custodian R		nk High Custodian Rank	Medium Custo		444	φ. φ.	6 <sup>10</sup>
	by Custodian R		nk High Custodian Rank	Medium Custo		444	\$° \$	-10- -10-
Computer	by Custodian R		nk High Custodian Rank	Medium Custor		~~~		
Computer Hard Drive	by Custodian R		nk High Gustodian Rank	Medium Custor		~~~~		-10- -10-
Computer Hard Drive Email	by Custodian R		nk High Custodian Rank	Medium Custo		~~~~		
Computer Hard Drive Email Mobile	by Custodian R		nk High Custodian Rank	Medium Custor		~~~~		
Computer Hard Drive Email Mobile Removable Media	by Custodian R		nk High Custodian Rank	Medium Custor		~~~		
Computer Hard Drive Ernail Mobile Removable Media Network	by Custodian R		nk 👥 High Custodian Rank 🔹	Medium Custo		\$ \$ \$	• •	-0 <sup>2</sup>
Computer Hard Drive Email Mobile Removable Media Network Paper	by Custodian R		nk High Cutoden Renk	Medium Custor		47 47 47 50	e e	60

A discovery scoping, proportionality, and data tracking tool, Evidence Optix® **disrupts** the traditional discovery process with a **powerful**, **attorney-driven workflow** that begins in the gap between legal hold and collection – allowing firms to **wrap legal services** around this innovative process.

This gamechanging framework:

- **Guides** legal teams through a systematic custodian and data assessment
- **Ranks** custodians based on their level of importance
- Scores data source burden and effort
- Calculates real-time cost projections
- **Enables** scenario generation for budgeting, negotiation, and proportionality arguments
- **Centralizes** data source tracking throughout the litigation lifecycle
- **Provides** a dynamic iterative process as the facts in dispute are refined

# **Evidence Optix® Provides the Path to:**

The patented heat map is automatically generated from custodian and burden rankings assigned during the attorney-driven assessment process, demonstrating cost implications in real time.



#### Time to gain a competitive edge.

Time to get involved in early discovery scoping.

Time to evaluate proportionality based on information, not speculation.

## Time for Evidence Optix.

**Contact Us Today:** info@insightoptix.com



## **Enhance client relationships**

This consistent process with real-time metrics provides transparency, efficiency, and productive communication with in-house legal and IT.

## Align spend to client expectations

Shifting attorney hours up front maintains revenue while sending less data downstream, thereby reducing overall cost to clients.

### **Accelerate discovery**

/

I

Early involvement and organization gives critical institutional knowledge to inform case strategy and adeptly prepare for conferences, depositions, and motions.

## Negotiate from a position of strength

Capture the granular data necessary to articulate the burden and relevancy of discovery requests and support proportionality arguments.

#### **Mitigate risk**

Centralized decisioning, documentation, and transparency on behalf of corporate clients helps prevent inconsistencies, errors, data loss, and sanctions.

### Maintain a historical record

In-house and outside counsel decisions are captured and recorded, providing easy access when needed for future reference and evaluation.