

Legal Hold **evolve**™

Next-Generation Legal Hold, Built for
How Corporations Actually Work

Created to solve the challenges corporate legal departments face today — rigid workflows, low custodian compliance, limited visibility, and systems that manage notifications but generate little insight.

We reimagined legal hold from the ground up, combining modern technology with real world input to deliver a solution that brings together power, usability, and flexibility in a streamlined experience.

Designed with Corporations, Not Assumptions

Built alongside corporate legal teams through ongoing collaboration — continuous feedback, workflow analysis, and product testing.

- 1 Power without complexity
- 2 Insight, not just information
- 3 Connected, not decentralized

What You Gain with Legal Hold Evolve



Modern, Intuitive Experience

Simple, clean interface designed for speed, clarity, and ease of use.



Actionable Intelligence

Track, analyze, and act on custodian responses in real time.



Workflows that Mirror Reality

Practical processes aligned with how corporate legal departments actually operate.



Complete Custodian History

End-to-end tracking from first notice through final release, all in one place.



Custodian Compliance Tools

Targeted, concise emails and surveys drive faster and more accurate responses.



Flexibility Without Complexity

Customize workflows, templates, and automation without IT involvement.

Legal Hold *Evolved.*

Your Command Center for Discovery Management

Elevate your legal strategy by combining Legal Hold Evolve with Evidence Optix[®], enabling centralized collaboration and a unified system of record for legal hold and discovery management.

Together, they create a command center that spans notifications, custodian evaluations and rankings, early case strategy, scoping and budgeting, and data source assessment and management — helping corporate legal teams prioritize, surface risks, and make smarter decisions earlier.

Functionality That Drives Results

Core Capabilities



Advanced email notification builder

Customize delivery, frequency, reminders, escalations, and releases with precision.



Enhanced templates and automation

Design new matters quickly, with consistent execution and defensibility.



Custodian groupings

Tailor email notices and surveys by role, department, priority, or sensitivity.



Robust survey designer

Capture more accurate responses through flexible question types and configurations.



Data source tracking

Create data source preservation, collection, and chain-of-custody documentation.



Defensible release process

Release custodians individually or in bulk with documented decisioning.

Visibility + Reporting



Dashboards

View insights at the matter, group, and custodian level.



Compliance + acknowledgement tracking

Monitor responses, escalations, and outstanding actions in real time.



Comprehensive reporting

Retrieve information in usable formats for audits, oversight, or downstream workflows.

What's Next?

Quarterly releases throughout 2026 include rapid delivery of new features, enhancements, and integrations.

Join the Legal Hold Evolution

Schedule a demo of Legal Hold Evolve and Evidence Optix[®] today.
Contact us at info@insightoptix.com to schedule a demo.