

## E-DISCOVERY SOFTWARE ANALYTICS CHECKLIST

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When assessing an analytics offering for e-discovery, be sure to look for the following features and capabilities. Many are essential to deal with the great variety of e-discovery projects legal teams encounter today.

- ❑ **Integrated with your document review platform:** The analytics capabilities should be seamlessly integrated into your document review platform. This eliminates costly data migrations after analytics, and allows your teams to analyze any set of documents at any time.
- ❑ **Can analyze large sets of data – as well as small:** Document volumes continue to grow in e-discovery so teams need analytics tools which can work with ever expanding volumes of data. However, legal teams frequently encounter small projects where less than 5,000 documents need to be reviewed. The right analytics tool can turn this into a one-day project.
- ❑ **More than just an “ECA” solution:** The analytics software should do more than just provide ECA capabilities – giving your team valuable insight into data at any stage during the project rather than just the beginning. ECA only solutions tend to be limited in capabilities and in the amount of data they can evaluate. They also require you move the data to a review platform which creates problems downstream when new custodians or keywords are added to the matter.
- ❑ **Can create “smarter assignments” for attorneys to review:** The power to analyze large document sets and deliver statistics to project managers is important. But the ability to transform large sets of data within the context of a larger review project is critical. The right solution will turn those large, raw data sets into smarter assignments where they can be prioritized and placed into the review workflow. This streamlined pairing of assignments to the correct reviewers brings immediate efficiencies to the project.
- ❑ **Can be used by the entire legal team:** Some analytics solutions can only be used by a lead investigator and are useful only in early assessment type use cases. This is unfortunate as the impact of the analytics during the actual assignment review can dramatically improve both the document decision rates per hour but also the quality of the decisions made. Whether utilized during first pass review or later during privilege or QA reviews, your analytics tools should keep working until all portions of document review are completed.
- ❑ **Can be integrated with your existing workflows:** As with all parts of e-discovery, the more integrated the analytics process and workflow is to the rest of your e-discovery process the better change your team has to realize positive outcomes. Look for analytics software that will support your current workflows, rather than supplant them.
- ❑ **Can analyze a wide variety of data types:** At a minimum your analytics tools should provide analysis on terms, concepts, date ranges, custodians, social networks and document types. Often times these reports are the first bits of information a legal team receives about the document set. Look for advanced analysis involving meta-data, concepts, and term frequencies.
- ❑ **Was purpose built for e-discovery:** The market has seen an introduction of analytical tools which were originally designed to solve problems outside of the e-discovery workflow. This can cause problems during review and production as e-discovery has unique requirements with e-mail and attachments, duplicate documents, and coding families which can be unsupported by immature solutions.

- ❑ **Is easy to use:** While some forms of analytics are intended for more technically savvy users, an easy to use and learn UI will enable more members of your legal team to benefit from its power and problem solving capabilities.
- ❑ **Is defensible:** Reports, trends, and insight gleaned by analytics software often power review strategy. Your legal team needs to have confidence not just in the computer science and algorithms involved, but also with the process and workflows. Look for proven solutions from a company with experience in both e-discovery and legal matters.