

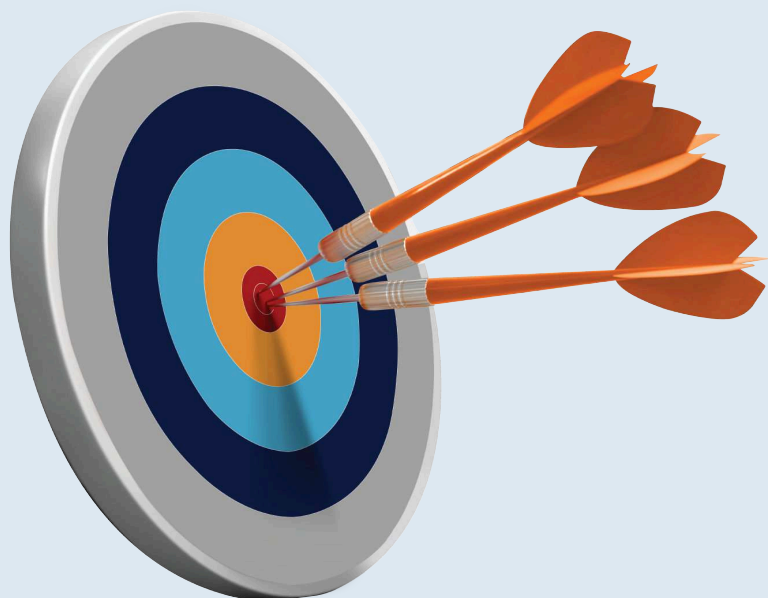
THE FIRST SAAS-BASED, TECHNOLOGY-ENABLED WORKFLOW FOR ACTIONABLE PROPORTIONALITY

In 2015, the amendments to the Federal Rules of Civil Procedure required that proportionality must be used to define the scope of discovery. Since that time, judicial rulings have consistently reinforced the necessity of creating a defensible and transparent method to put this concept into practice.

"Although discovery is designed to ensure that all parties are well-informed before trial, courts need not tolerate discovery that is inefficient, time-consuming or ill-suited to the economics of the case. Accordingly, proportionality is an essential component of every discovery schedule."

-Hon. Christopher P. Yates, 17th Circuit Court,
Michigan Specialized Business Docket

EVIDENCE OPTIX[®] IN ACTION: A Case Study - One Week / 222 Custodians



63

Custodians – Not relevant / released; no data collected (28%)

130

Custodians – Medium relevance; limited data collected (59%)

29

Custodians – Priority relevance; all data collected (13%)

PROPORTIONAL DISCOVERY ASSESSMENT[®]

Align the scope of discovery with the merits of the case by utilizing this patent-pending workflow. Evidence Optix[®] facilitates assessment and prioritization of relevant custodians and identification of key data sources to support actionable proportionality. Utilize this defensible, transparent, and comprehensive approach to narrow the scope of discovery early, thereby reducing costs and burden downstream.



IMAGINE

if a number of custodians could be released after a five-minute assessment interview.



ENVISION

those remaining being ranked according to their relevance to the case.



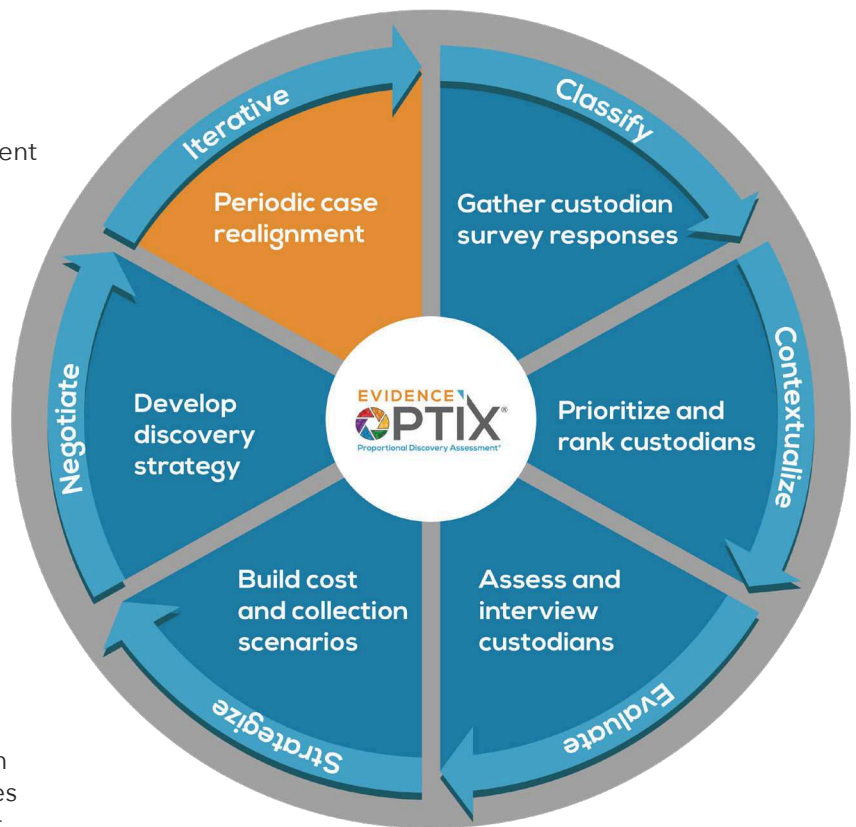
PICTURE

all the various data sources being scored and classified based on collection difficulty.



VISUALIZE

building assessment scenarios which organize custodians and data sources based on the claims and defenses at issue, with real-time metrics and cost estimates to support Rule 26(f) negotiation strategies.



Legal practitioners need a comprehensive, transparent, defensible method to make proportionality arguments. Evidence Optix[®] takes this from a concept to an actionable process.