

# Advisory Services



# Environment Assessments

## A deep dive to drive profits.

An eDiscovery Environment Assessment is a comprehensive study of all the critical levers represented in your current operating model. George Jon will analyze the following elements:



### Technology

We will perform a comprehensive audit of the technology used in your eDiscovery environment, including (but not limited to) application and OS best practices (per George Jon and trusted vendors). We then perform a secondary best practice assessment on component harmony, applying our 15 years of real-world experience to see how the elements in your environment function as a cohesive system. The resultant data allows us to design a perfect end user experience, making recommendations on components including:

- Physical server hardware
- SQL architecture
- Virtualization / compute
- Network
- Storage
- Backups and disaster recovery
- Security
- Load balancing



### Process (optional)

To optimize the technologies employed in your eDiscovery system, GJ consultants will assess the efficiency and effectiveness of surrounding processes, including core elements surrounding:

- Data governance and management
- Environment support (IT)
- Application-specific workflows
- Information security process and protocols
- Maintenance schedule
- Disaster recovery testing and simulation



### Financial (optional)

The financial health of your eDiscovery environment and operations can be assessed and benchmarked against historic metrics gathered from previous/existing clients, according to your specific environment size:

- Total cost of platform ownership
- Average annual capital expense
- Average annual operating expenses
- Hosting and processing costs (per GB)
- IT support costs (per GB)



## The Benefits of Environment Assessments

- Identifies, documents and provides remediation steps to address issues affecting the eDiscovery platform
- Determines hardware/software compatibility issues
- Sets goals and a roadmap for future improvements, growth and management
- Recommends disaster recovery and backup procedures to ensure data security and integrity
- Provides cost and effort estimates for implementing recommendations
- Weighs cost benefits across strategic initiatives including outsourcing of hosting, cloud migrations, and on-premises deployments
- Outlines immediate cost savings that will boost your bottom line
- Identifies areas of weakness/strength in workflow and supporting resources
- Allows you to leverage GJ professional services for ad-hoc projects (application upgrades/installs, SQL migrations/deployments, etc.)

# ENVIRONMENT ASSESSMENT FRAMEWORK

To begin the assessment, we gather relevant quantitative and qualitative data to construct a current state baseline, to be validated by your executive team. This is followed by a gap analysis, comparing the current state baseline to management expectations, George Jon best practices, and industry benchmarks to identify areas for remediation and improvement.

The outcome is a strategic roadmap for optimizing your eDiscovery operations, prioritizing remediation recommendations and providing a detailed implementation plan for short- and long-term initiatives.

Short-term recommendations (“quick wins”) are items that can be implemented immediately (and at low cost) with a high return to the business, such as environment configuration changes and workflow optimization.

Long-term recommendations are strategic in nature, requiring 3+ months to implement and a meaningful budget commitment. Sample initiatives could be migrating environments to new hosting platforms or replacing critical technologies to enable enhanced automation and reporting.



## PHASE 1

**GATHER INTEL**

- Vision & Expectations
- Technical & Business Requirements
- InfoSec Policies & Procedures
- Staffing & Support Model
- Environment Data Collection
- Existing Documentation

**ASSESS THE CURRENT STATE**

- Business Requirements & Growth Strategy
- Current Technology Stack
- Operational Processes & Workflows
- Environment Performance & Pain Points

*Gather environment documentation, data and insights to determine current baseline state, plus hold GJ + client workshop sessions.*

## PHASE 2

**DEVELOP RECOMMENDATIONS BY CATEGORY**

- Stack Config.
- Performance
- Scalability
- Security
- Costs

**PRIORITIZE RECOMMENDATIONS**

- Alignment to Biz/Tech Strategy
- Implementation Requirements
- Alignment to Best Practices
- Resource Allocation
- Budget Constrains

*Develop a prioritized list of directives, broken down by category, for enhancing the platform's current state and ensuring ROI.*

## PHASE 3

**ASSESSMENT REPORT & REMEDIATION ROADMAP**

- █ An end-to-end view of the eDiscovery current state, identifying gaps and recommendations
- █ Identification of critical risks or issues that could have a significant impact on client deliverables
- █ Roadmap aligned to biz/tech vision and client requirements, including remediation cost estimates

*Deliver Assessment Report & Executive Summary detailing areas needing remediation and future-state roadmap options.*