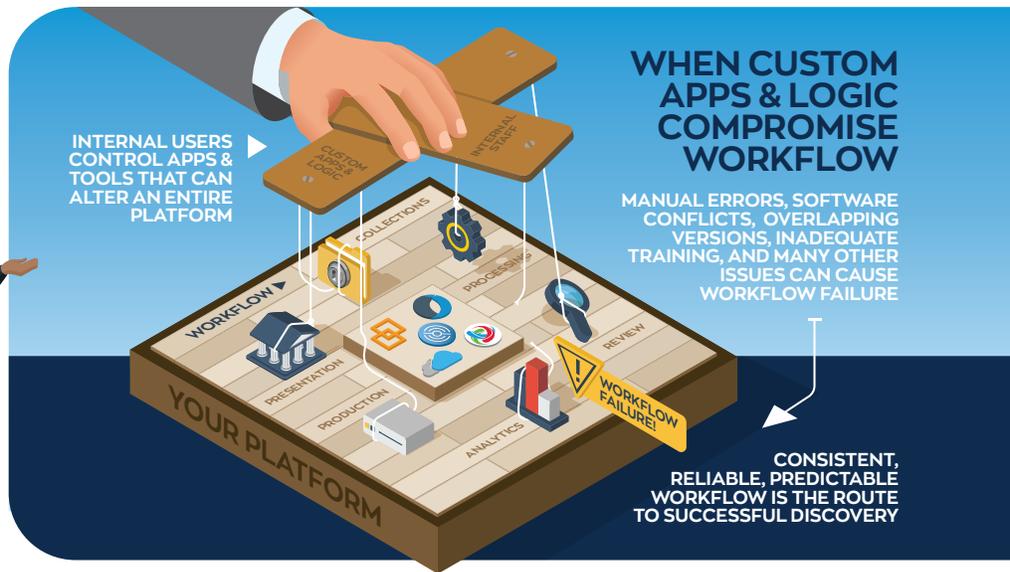# Assess efficiency in your eDiscovery workflow.
Or suffer the consequences…

As the primary driver of standardization, client value-addition, and ultimately, deadline adherence, the architecture of your eDiscovery workflow is a "make or break" resource for your project teams. In supporting hundreds of eDiscovery environments over the past decade, George Jon has seen every variation across client workflows and has compiled a correlative library of best practices that enable significant cost reductions and ongoing margin improvement.

Effective workflow must not only be inherently elastic, but also balanced across the critical levers of an operating model, which means it should take people, organization, process, and technology into consideration when being constructed and optimized.

Um, we have a problem…

In our experience, these levers are perpetually changing; as such, optimal workflow must be able to quickly adapt and transform in response to the following real-world scenarios:

INTERNAL USERS CONTROL APPS & TOOLS THAT CAN ALTER AN ENTIRE PLATFORM

CUSTOM APPS & LOGIC

INTERNAL STAFF

YOUR PLATFORM

WORKFLOW

COLLECTIONS

PROCESSING

PRESENTATION

PRODUCTION

ANALYTICS

REVIEW

WORKFLOW FAILURE!

WHEN CUSTOM APPS & LOGIC COMPROMISE WORKFLOW

MANUAL ERRORS, SOFTWARE CONFLICTS, OVERLAPPING VERSIONS, INADEQUATE TRAINING, AND MANY OTHER ISSUES CAN CAUSE WORKFLOW FAILURE

CONSISTENT, RELIABLE, PREDICTABLE WORKFLOW IS THE ROUTE TO SUCCESSFUL DISCOVERY

TECHNOLOGY

1. Changes in the application portfolio being used across the ERDM (e.g., moving to a new centralized processing platform).
2. Refactored application architecture that fundamentally changes integration points across the workflow.
3. New tools and technologies that enter the market for use as utilities on top of or alongside the workflow.
4. New application/core functionality is developed and released across key applications.

PEOPLE & ORGANIZATION

1. Shifts in the level of application administration and technology expertise across engagement teams.
2. Changes in roles and responsibilities across engagement teams, or in the overall organizational design, for work execution (e.g., centralization to decentralization).

PROCESS

1. Regulatory shifts in the industry that require more/less QC, audit operations, and reporting requirements.
2. Changes in internal decision making and approval processes for exception handling (this is not in direct reference to actual data exceptions).
3. Client-mandated changes, such as data delivery frequency and dataset types, that require process tuning.
4. New client SLA and deadline requirements.

These levers exist on a circuitous continuum and exert a major impact across the entire workflow when one or multiple changes are introduced. For this reason, among others, most large law firms and service providers have created their own "custom applications/logic" to sit on top of their eDiscovery platforms and drive workflow from end to end. When done correctly, this can certainly be a game changer and accelerator. However, our experience in conducting workflow assessments and implementing remediation has been that this approach requires just as much, if not more, governance, tuning, and evergreening across the organization.

Custom Applications for eDiscovery:
High Promise, Low Performance

In early 2020, the George Jon Consulting Team was engaged to conduct a processing workflow assessment, from setup to reporting. The client was leveraging an in-house tool, created over a few years, to act as the presentation layer between their internal engagement staff and the workflow-driving technology. In theory, this made a lot of business sense as it enabled rapid workflow changes, removing the heavy burden of internal resource training at the application layer while reducing the time between data acquisition and review. If functioning properly, this process represented an extremely marketable asset or value proposition for end clients.

In reality, the custom-built application became a collector of both operational and technical debt across the enterprise and ultimately resulted in sub-optimal workflow performance that negatively affected client satisfaction:

A comprehensive Application Development Lifecycle Plan, critical for ensuring proper code changes and implementations, was never put in place. Nonetheless, changes were approved and universally implemented across production deployments and versions, resulting in static queries and logic with multiple code versions and programming languages.

The lack of a centralized business governance body to ensure the continuity of knowledge transfer, training and updating of old functionality left a knowledge gap that was difficult to bridge.

Transfer of logic utilization from the eDiscovery application to the in-house application resulted in the firm's inability to take advantage of stable, enhanced functionality released by the professional eDiscovery application vendors. This necessitated heavy lifting internally while fundamentally deteriorating the application subject matter expertise across the firm's most valuable human resources.

The attempt to create a blanket application for all engagement use cases created a burdensome and complicated process that required manual data entry for case setup, resulting in multiple errors and downstream performance and quality concerns.

The application was not built with the elasticity to handle varying scales of data across different geographical regions, leading to inconsistent throughput.

As a result of our engagement, we provided the client with both near-term workflow remediation and long-term strategic considerations, focusing on critical parameters for success – elasticity, automation, performance, reliability, and enhanced reporting – along with a time and cost roadmap for implementation.

If your firm is considering a workflow review and optimization initiative as a part of your business plan and wants to learn more about how George Jon can assist you as a trusted advisor to increase revenue, drive efficiency, and reduce costs, please give us a call and speak with one our expert consultants.

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