

CASE STUDY

Global Corporation Efficiently Manages Tens of Thousands of Technical Documents Across More Than 70 Patent Cases

“ With each new case, our client realizes greater efficiencies, cost savings and risk reduction. ”

Client Snapshot: Global Technology Leader

- Catalyst central repository hosts 300 million documents
- Pre-categorized documents are quickly assigned to current and future cases without re-review
- Process dramatically reduces ramp-up time to respond to requests—with five-fold return on investment to date

An Innovative Approach to Data Re-Use Across Cases

Most companies spend significant time and budget “reinventing the wheel” in repetitive litigation. That is, they (or their outside counsel) collect documents and data from custodians and noncustodial data sources, and then send the documents to multiple vendors (or law firms) for processing, categorization, review and production. When the matter is complete, the data and work product is dispositioned. All investments made by the company are lost each time—even when each new matter involves many of the same documents that have been produced dozens (or even hundreds) of times in the past.

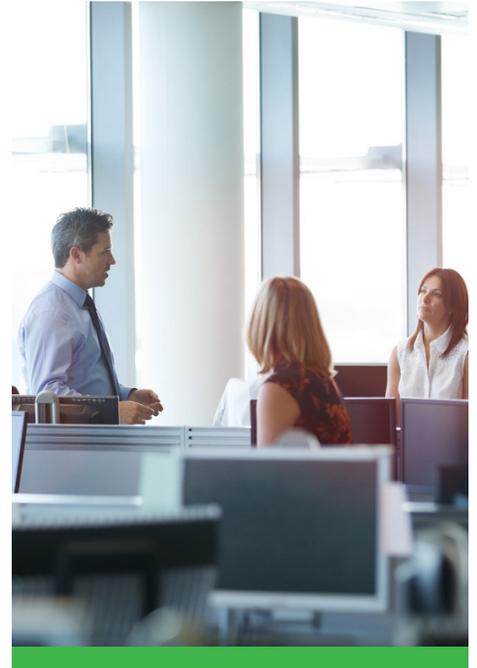
Not this technology company. This case study addresses how Catalyst helped our client, who faces scores of repetitive patent suits related to core electronic components, develop an efficient process using a centralized repository for data reuse across cases.

By way of background, over the past decade, Catalyst has hosted in a central repository approximately 300 million documents on behalf of our client (nearly every document subject to litigation) across more than 425 matters, with more than 800 million documents produced. To provision a new matter, the company can simply pull documents—sometimes millions at once—from key custodian collections already hosted by Catalyst. As a document is copied to the new case, it retains all privilege and confidentiality coding. This provides immediate access to data for ECA, and dramatically reduces ramp-up time to respond to litigation, regulatory and compliance requests.

This particular case study dives into how we helped the company efficiently manage, and quickly produce, the subset of product specification data across 70 patent suits.

How Catalyst Enabled an Efficient Process and Mitigated Risk

Our goal was simple: provide a centralized environment to drive efficiency by enabling the immediate production of core technical documents for each new patent case, a “product packet.” We employed a “review once, produce as many times as needed” approach to control costs—while at the same time reducing risk.



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The product packet database contains approximately 30,000 unique documents. Of those, approximately 16,000 were reviewed (again once) by an external review vendor, while the remaining 14,000 were quickly pre-categorized by bulk update from one of the company's paralegals. Once categorized, we hosted such documents—alongside hundreds of millions of other case-related documents—in our document repository for assignment to current and future cases.

With the repository in place, our client's legal team can simply search on key fields, and/or use search terms related to the product specification documents, to assign those documents to a new matter. The documents are copied to the new case, retaining all coding decisions, and are thus available for early case assessment and immediate production.

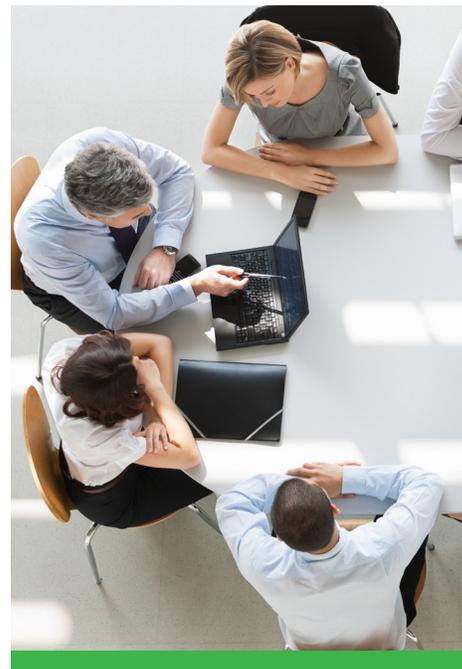
Our process and technology have helped the client:

- Be more efficient by categorizing a core subset of relevant documents just once and produce as often as needed.
- Enable rapid response, and assignment of those documents to a new matter for production, supporting a strategic advantage in litigation—especially when large sums are at stake.
- Ensure categorizing and tagging consistency for each document.
- Protect the inadvertent production of sensitive or privilege documents.

Results

With each new repetitive litigation, our client becomes more efficient and saves more review costs. To date:

- There has been more than a five-fold return on investment: Each document reviewed once has been produced an average of 5.6 times.
- 18,000 unique documents have been produced across 72 matters.
- Nearly 101,000 total documents have been produced, with an average of 1,400 documents per matter.
- The repository currently contains nearly 30,000



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documents, nearly half of which were never reviewed but bulk updated by a paralegal at the company.

- The client has achieved cost savings in excess of \$300,000 (*assuming a 33% richness collection*).

The Larger Value of a Centralized Legal Document Repository

The metrics set forth in this case study are not intended to represent the larger cost savings, or other benefits, from using a multi-matter management platform with a core repository. Our technology, supported by professional services, continues to save the company significant time and money and mitigate risk.

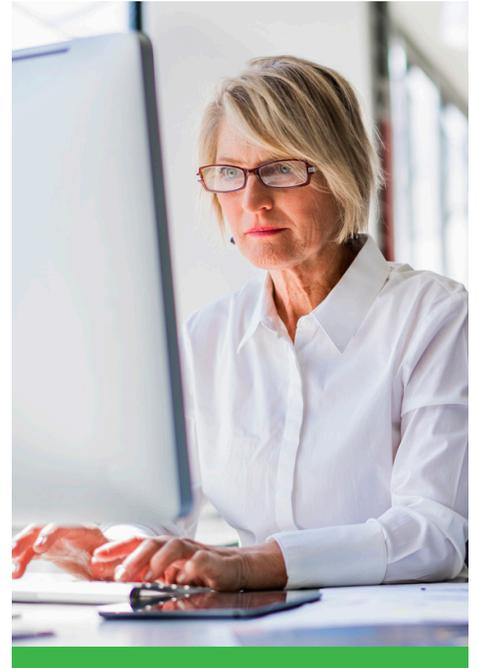
In addition to helping our client more efficiently manage initial productions of product packets, we also have:

- Developed core fact, deponent and privilege libraries to accelerate efficiencies and cost savings.
- Categorized and managed data sets similar in nature to the technical documents, including licensing agreements, employment policies and marketing research.
- Centralized and managed sensitive custodian documents that are produced over and over again.

Below is a summary of the hard cost savings, and some of the less quantifiable benefits, of a multi-matter management system with document repository:

Hard cost savings: Document reuse is just a fraction of the value of centralizing discovery data into a single repository. In terms of hard cost savings, a centralized model eliminates not only the costs of reviewing the same document over and over again, but also the need to interview the same set of sensitive (“frequent flyer”) custodians and collect their documents, as well as eliminate duplicate processes such as document ingestion, text extraction, conversion, OCR and processing. Once a document is stored in a central repository, it can be quickly provisioned to any number of matters as needed.

Greater efficiencies: While it can be difficult to quantify the cost of inefficiencies, centralization simultaneously eliminates the



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headache and extra costs of hosting data with multiple vendors and outside counsel, as well as the unnecessary costs associated with inconsistent coding and other practices across documents, cases and firms.

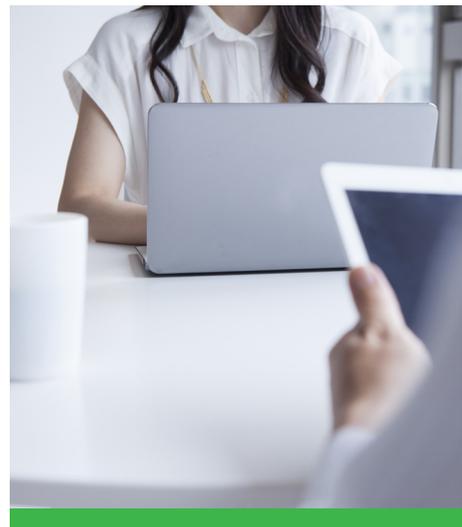
Risk reduction: Centralization also means less risk, with fewer coding mistakes across documents and matters, driven by consistent process and work-product from prior cases. It reduces the risk of inadvertent production of sensitive or privileged material. Centralization also helps keep your data secure by allowing in-house teams to control access, and limit the flow of sensitive information, eliminating the risk of maintaining your most sensitive data across disparate law firm and vendor databases.

Business intelligence for real-time decisions: Finally, only by aggregating data into a single repository and extracting information across cases can cross-matter reporting and meaningful metrics be possible (e.g., matter status, collections, custodian summaries, outside counsel spend, expense versus budget and other key performance indicators).

Conclusion

Catalyst continues to work with this client, as well as other corporations, to more effectively leverage data and document reuse opportunities to create a more efficient and intelligent discovery process. In addition to product packets, our clients will continue to reuse prior work-product to automate confidentiality and privilege tagging, ensure consistent redactions, and seed Catalyst's TAR 2.0 predictive technology engine.

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