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SYMPOSIUM 2025

Managing Discovery Across Matters

An In-House Counsel Roundtable



Agenda

- Managing Discovery in a Corporate Legal Department
- Building a Scalable & Sustainable Program
- Technology: Part Problem & Part Solution
- Final Thoughts
- Questions

Today's Session

- **Managing Discovery across Matters: An In-House Counsel Roundtable**
 - Plenty of guidance is available on how to manage a particular discovery project effectively, but few organizations are fortunate enough to face only one matter at a time. Most face several each year. For such organizations, proactive, cross-matter discovery management can lead to significant increases in efficiency, reductions of cost, and enhancements to defensibility. This moderated roundtable discussion will bring together senior in-house counsel to discuss the challenges and benefits of proactive, cross-matter discovery management, including: selecting and leveraging technology; allocating internal and external resources; managing budget and outside spend; developing processes and playbooks; and more.

Managing Discovery in a Corporate Legal Department

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Managing Discovery in a Corporate Legal Department

- Key Challenges
 - Operational Boundaries
 - Evolving Technology
 - Resource Limitations
 - Budget Restrictions



Managing Discovery in a Corporate Legal Department

➤ External Factors

- Global economy, local regulations
- Growth of digital information
- Digital transformation
- New communication platforms
- Complexity of data
- Evolving regulatory landscape (privacy, security, cybersecurity)
- Increasing legal and technology costs

➤ Internal Challenges

- Complex organizations
- Multiple, concurrent matters
- Multiple law firms
- Repeat custodians and data sources
- Managing the lifecycle of preserved / collected ESI

Building a Scalable & Sustainable Program

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Building a Scalable & Sustainable Program

- **Adopt Programmatic Approach.** Define the program with clear objectives, roles & responsibilities.
- **Create Case Management Practices.** Develop end-to-end workflows for the management of legal matters and investigations.
- **Know Your Data.** Invest in an Information Governance & Management Program to review new data sources and track current systems.
- **Implement Vendor Management Program.** Onboard vendors to provide key services and extend discovery team capabilities.
- **Prepare for Change.** Consider response plan for peak activity, cyber-attacks, divestitures, mergers & acquisitions.
- **Measure Performance.** Create and track key metrics.

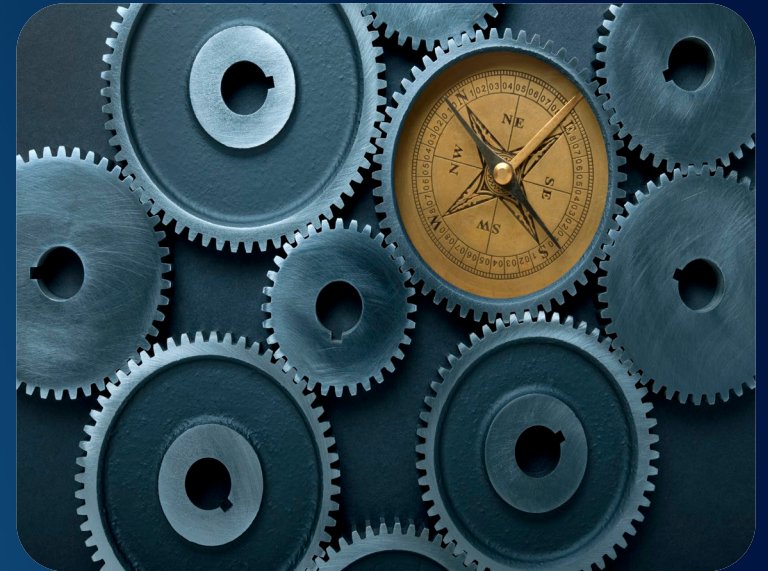


Technology: Part Problem & Part Solution

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Technology: Part Problem & Part Solution

- Education. Invest in technology education.
- Automation. Automate whenever possible – workflows, repetitive tasks, client portals.
- Manage Information. Limit and centralize data repositories – improves reporting capabilities and economic power.
- Preparation. Design, measure results, and Test, Test, Test!



Final Thoughts

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Final Thoughts

- In-house corporate discovery teams are the core of consistent repeatable discovery processes, bridging the gap between internal and external teams
 - Tip: Develop strong internal, law firm, and vendor relationships
 - Tip: Apply a Programmatic Approach – build and maintain your Program and measure, review, and constantly improve
 - Create a culture of education, aligning program goals with professional growth



Questions

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