






What Automated Legal Hold Looks Like in Practice

Operationalizing defensible preservation with Venio Legal Hold


WHY ORGANIZATIONS CHOOSE VENIO LEGAL HOLD

 <p>Operational Control Centralized visibility across matters, custodians, and systems</p>	 <p>Measured Compliance Automated acknowledgment tracking and escalation workflows</p>	 <p>Enterprise Integration Secure synchronization with HR directories and enterprise platforms</p>	 <p>Defensible Documentation Comprehensive audit trails from initiation to release</p>	 <p>Cloud-Based Scalability Modern deployment without IT infrastructure burden</p>
--	--	--	---	--

A legal hold is not merely a notification exercise. It is a governance function. When litigation is reasonably anticipated, organizations must demonstrate that their preservation decisions were timely, documented, monitored, and enforceable. Manual tracking and disconnected workflows introduce risk, often silently.

Venio Legal Hold is a cloud-based, enterprise-ready solution designed to operationalize the duty to preserve across legal, HR, compliance, and IT with measurable accountability at every stage.

This is what automated legal hold looks like in practice:



Structured Matter Initiation

IN PRACTICE

Effective preservation begins with controlled matter intake — not ad hoc emails or spreadsheet trackers. Legal teams must define scope, identify stakeholders, and document preservation intent immediately.

- Configurable matter intake workflows
- Standardized hold templates
- Defined custodian group structures
- Immediate audit documentation

HOW VENIO HELPS

Venio Legal Hold provides structured matter creation with configurable workflows and reusable templates. Every action from initiation to notification is captured in a centralized, defensible record.

01



Intelligent Custodian Synchronization

IN PRACTICE

Custodian populations are dynamic. Employees change roles, depart, or move across matters. Static imports create exposure.

- Integration with corporate directories (Active Directory, HRIS)
- Real-time custodian synchronization
- Visibility across overlapping matters
- Automated updates for employee status changes

HOW VENIO HELPS

Venio Legal Hold integrates securely with enterprise systems through APIs to synchronize custodian data continuously. Changes in employment status or role are reflected automatically.

02



Measurable Notification & Escalation

IN PRACTICE

Sending a hold notice is only the beginning. Organizations must track compliance, follow up on non-responses, and document enforcement.

- Customizable notification templates
- Automated acknowledgment tracking
- Escalation and reminder workflows
- Full interaction logging

HOW VENIO HELPS

Venio Legal Hold automates distribution, acknowledgment tracking, and escalation management. Non-responsive custodians are flagged automatically, and every communication is recorded.

03



Coordinated Preservation with IT

IN PRACTICE

Preservation obligations extend beyond individuals to systems. Without structured coordination between legal and IT, technical preservation steps may be inconsistent.

- Integration with Microsoft 365
- Triggered workflows for IT preservation
- Secure synchronization of hold data
- Documentation of technical activities

HOW VENIO HELPS

Venio Legal Hold bridges legal intent and IT execution through integrated workflows and system connectivity. Legal teams maintain visibility while IT actions are aligned and defensible.

04



Continuous Monitoring & Controlled Release

IN PRACTICE

Legal hold is an ongoing obligation. Monitoring compliance and formally releasing holds are equally critical.

- Real-time reporting dashboards
- Matter-level audit trails
- Structured hold release workflows
- Exportable defensibility documentation

HOW VENIO HELPS

Venio Legal Hold provides centralized reporting and controlled release management. When preservation obligations conclude, releases are documented with the same rigor as initiation.

05

Ready to automate your legal hold process?

See how Venio Legal Hold can transform your preservation workflows.

[Request a Demo](#) →