

# From Legacy to Modern eDiscovery

When to Stay, When to Switch, and How to Migrate Without Risk

A nine-chapter playbook for legal operations and litigation support leaders.

INSIDE

9 CHAPTERS



## Diagnose

Identify true platform pain vs. training gaps.



## Build ROI

Quantify real costs and get leadership approval.



## Migrate Safely

Phase-by-phase plan that avoids disruption.

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# Is Your Platform Actually the Problem?

Before you spend time on vendor demos, answer this honestly. The answer determines whether you should migrate, optimize, or retrain. Run this diagnostic first to validate your instincts — or to prevent an unnecessary, expensive migration.

## The 10-Point Diagnostic

1

**Processing speed forces you to schedule work around ingestion queues (e.g., start Friday, check Monday)**

1 / 0

Platform throughput ceiling, not a volume spike

2

**Reviewers are manually deduplicating, rebuilding threads, or correcting metadata that the platform should handle**

1 / 0

Core functionality gap: attorneys are doing the platform's job

3

**Every new data type (Slack, Teams, mobile, cloud) requires a support call or custom script**

1 / 0

The platform is a generation behind on data ingestion

4

**You cannot tell a client what their matter costs in real time without rebuilding a spreadsheet**

1 / 0

No live billing visibility — a revenue and relationship risk

5

**Your vendor cannot produce a current SOC 2 Type II report on request**

1 / 0

Security posture is an unverifiable material risk on regulated matters

6

**The last meaningful product release you remember was more than 18 months ago**

1 / 0

Platform is in maintenance mode, no roadmap investment

7

**Connecting this platform to any other system requires custom development every time**

1 / 0

No native integration architecture — you are accumulating tech debt

8

**TAR, concept clustering, and email analytics are absent or priced as expensive add-ons**

1 / 0

Analytics treated as premium puts you at a cost disadvantage

9

**A meaningful portion of onboarding time is spent teaching workarounds for platform limitations**

1 / 0

Institutional knowledge built on compensating for vendor failures

10

**Your team feels anxious — not confident — when a high-volume or complex matter is assigned**

1 / 0

Platform has become a risk factor, not an asset

## Your Score

**0—2**

Your platform may be adequate. Run a training and utilization audit before concluding otherwise.

**3—5**

Performance gaps are compounding. Begin evaluating alternatives now — do not wait for a deadline crisis to force the decision.

**6—10**

Migration is not a future project — it is an active operational risk. Every quarter you delay increases cost and complexity.

## Before You Blame the Platform: A Quick Sanity Check

Run this three-question check before concluding the platform is the root cause. If any answer is "we have not done this," fix it first and re-score in 90 days.

### ✓ **Training currency**

When did your team last receive formal training directly from your vendor? If it has been more than 18 months, schedule a session. You may be missing functionality that solves your pain points.

### ✓ **Feature utilization**

Pull your platform's feature list. Are you using less than 60% of documented capabilities? If so, you may have a training gap rather than a platform gap.

### ✓ **Support ticket analysis**

Review tickets from the past 12 months. High volume of defect reports = platform problem. High volume of how-to questions = training problem. The ratio tells you what to fix.

### 💡 **IF THE PLATFORM IS THE CAUSE**

If the platform still stands out as the root cause after this check, it is time to move forward with evaluation — and the rest of this guide shows you how to do it right.

# What Is Your Legacy Platform Really Costing You?



The conversation about migration almost always stalls on one objection: "migration is expensive." That framing is incomplete — it counts only one side of the ledger. Your current platform has real, recurring costs that are growing every quarter. They are just harder to see because they are distributed across your operation rather than sitting in a single budget line. This chapter helps you find, measure, and present them.

## 2.1 The True Cost Calculator

Fill this in with your own numbers before any leadership conversation. Pull invoices, payroll records, and support logs. The total almost always surprises people.

COST CATEGORY	WHERE TO FIND THIS NUMBER	ANNUAL (\$)
<b>Platform licensing + hosting fees</b>	Last invoice or contract value	\$ ____
<b>Per-GB or per-page processing overages</b>	Sum all overage line items in the last 12 months	\$ ____
<b>Staff time on manual rework (failed loads, reindexing, error correction)</b>	Hours/week × 52 × loaded hourly rate. Even 4 hrs/week at \$95/hr = \$19,760/yr	\$ ____
<b>Custom integration / scripting fees</b>	Vendor professional services invoices for custom dev	\$ ____
<b>IT support time on platform issues</b>	Hours/month × 12 × IT loaded hourly rate	\$ ____
<b>Attorney time lost to slow or broken tools</b>	Hrs/week on platform workarounds × 52 × attorney rate	\$ ____
<b>Unbilled write-offs caused by platform failure</b>	Time written off last 12 months directly platform-related	\$ ____
<b>Staff turnover costs</b>	Replacing one eDiscovery analyst: \$25K–\$50K. How many in 12 months?	\$ ____
<b>Missed matters due to platform limits</b>	Estimate 1 declined matter at average matter value (conservative)	\$ ____
<b>TOTAL TRUE ANNUAL COST</b>		\$ ____

## INDUSTRY BENCHMARK

Across eDiscovery platform migrations, the true annual cost of a legacy platform — when all categories are counted — runs **1.4x to 2.2x** the licensing cost alone. A team paying \$180,000/year in licensing typically spends \$260,000–\$395,000 annually in real cost. That gap is your migration ROI, and it is usually larger than the entire cost of switching.

## 2.2 The Cost No One Talks About: Staff Attrition

Experienced eDiscovery professionals know what modern tools look like. When your platform forces them to compensate for its failures daily, they update their resumes. The data on this is clear:

COST TO REPLACE AN ANALYST

**\$25K–\$50K**

Direct recruiting and onboarding costs.

RAMP TO FULL PRODUCTIVITY

**3–6 months**

You pay two salaries while getting partial output.

INSTITUTIONAL KNOWLEDGE

**Unquantifiable**

Workarounds, matter history, client preferences — gone.

One resignation per year, directly attributable to tool frustration, costs more than most migration budgets. Two resignations pay for an entire enterprise platform migration.

## 2.3 The Vendor Lock-In Premium You Are Probably Paying

Legacy vendors know that migration friction keeps customers captive. They price renewals accordingly. If you have not run a competitive evaluation in the last 24 months, you are almost certainly paying a lock-in premium of **15–25%** above market rate.

A documented competitive evaluation — even if you ultimately stay with your current vendor — almost always reduces your renewal cost by 10–20%. The evaluation process itself pays for its own time investment.

# The Approval Conversation



You have the diagnosis and the numbers. Now you need leadership alignment. This chapter gives you ready-to-use scripts, objection responses, and a one-page memo to move the conversation forward.

## 3.1 The 90-Second Open



*"I've been tracking our eDiscovery platform performance for [X months]. It's costing us more than the licensing suggests, and I have the data. I can also point to specific cases where it has limited outcomes. I'm not proposing a migration today — I'm proposing a structured evaluation to determine whether one is justified. It will take ~6 weeks and require [support/pilot budget]. Can I walk you through the findings?"*

### ✓ WHY IT WORKS

You are not asking for a migration budget — you are asking for permission to evaluate, a much smaller ask. Once leadership sees the true cost data, the migration decision usually makes itself.

## 3.2 Stakeholder Scripts

### For the Managing Partner or General Counsel (Risk + Competitiveness)

*"Our current platform presents three clear risks. First, we've had [X] processing failures or missed deadlines in the past year that can be directly traced to platform limitations. Second, our security posture cannot be independently verified — the vendor has not provided a current SOC 2 audit in [X months], creating exposure on regulated matters. Third, peer firms have already moved to platforms with TAR and analytics capabilities we lack, which is impacting how we price and deliver review work. I recommend a 6-week evaluation to determine whether a migration is warranted. I'm not asking for approval to switch — only to validate the need."*

## For the CFO or Finance Lead (Total Cost of Ownership)

*"I want to compare two numbers. On paper, we pay \$[X] per year for our current platform. In reality — when we include processing overages, manual rework, integration costs, and staff inefficiencies — the total is closer to \$[Y], a [Z%] gap. We also have a preliminary estimate from [Vendor Name] of \$[A] per year all-in, with a one-time migration cost of \$[B], resulting in a payback period of [C] months. I'd like to proceed with a formal evaluation to validate these figures before making any decision."*

**Tip:** Present your completed cost calculator from Chapter 2 alongside this script. Let the numbers do the heavy lifting.

## For IT Leadership (Security + Architecture)

*"I'm initiating a platform evaluation and need your input before engaging vendors. Specifically, I'd like to confirm whether our current platform meets our security baseline — including whether we have a current SOC 2 Type II report on file. I also want to understand the integration footprint, what systems are connected today, and what a migration would impact. Finally, I'd like you to be involved in the vendor security review, as each vendor will be required to respond to a written security questionnaire before we proceed to demos. Are you available to participate in the evaluation process?"*

## 3.3 The Objection Playbook: Word-for-Word Answers

**❗ OBJECTION** We just renewed our contract.

**✅ ANSWER**

Contract timing should guide our planning, not prevent evaluation. If we determine migration is warranted, we still have time to negotiate exit terms, credits, or a phased transition. Vendors typically negotiate rather than lose a customer. Waiting until renewal puts us under time pressure — the worst condition for making this decision. Starting now gives us leverage and a clear alternative.

**❗ OBJECTION** We can't risk disruption with active matters.

**✅ ANSWER**

That concern is valid, and it is exactly what a phased migration plan addresses. Closed matters are migrated first, with no risk to active work. Active matters are then moved individually during low-activity windows, with parallel access to both platforms maintained. This approach is standard and avoids disruption to ongoing review or production.

❗ **OBJECTION** What if the new platform has problems too?

✅ **ANSWER** That is why we run a pilot before any commitment. A 60–90 day pilot on a real closed matter allows us to validate processing, production, analytics, and support under real-world conditions. No credible vendor will refuse this. If they do, they should not be considered.

❗ **OBJECTION** We don't want to retrain the team.

✅ **ANSWER** There is a learning curve, but we are already training the team to work around limitations. The real question is whether we keep compensating for those gaps or move to a system that removes them. With structured, role-based training, most teams reach full proficiency within 60–90 days.

## 3.4 The One-Page Approval Memo — Adapt and Send

### MEMORANDUM

**TO:** [Managing Partner / General Counsel / Leadership]  
**FROM:** [Your Name], Litigation Support / eDiscovery  
**DATE:** [Date]  
**RE:** Request to Initiate eDiscovery Platform Evaluation

#### THE ISSUE

Our current eDiscovery platform ([Platform Name]) is creating recurring operational challenges in [processing speed / matter cost / team capacity]. Over the past 12 months, I have documented [X] platform-related incidents, [Y] hours of manual rework, and an estimated true annual cost of \$[Z], compared to a licensing cost of \$[W] — representing a gap of [%].

#### WHAT I AM REQUESTING

Approval to conduct a structured 6-week evaluation of 3–4 eDiscovery platforms. This will include a written RFP, scripted demos, reference checks, and a 60–90 day paid pilot on a closed matter. This request is for evaluation only — not migration approval.

#### RESOURCE REQUIREMENT

Approximately [X] hours of internal time, [Y] hours of IT involvement for security review, and a pilot budget of \$[Z] if we proceed to that stage. No migration commitment is implied.

#### EXPECTED OUTCOME

A clear, defensible recommendation: either to migrate with a defined cost-benefit case, or to remain with the current platform with documented justification. Either outcome strengthens our position at the next renewal.

# What to Require from a New Platform — Before You See a Single Demo



Vendor demos are designed to show you what they do well. The only way to make demos useful is to arrive with specific, weighted requirements — so that instead of watching a choreographed presentation, you are testing the vendor against your actual needs. Complete this chapter before you send a single RFP or accept a single demo invitation.

## 4.1 The Four Requirement Tiers — How to Use This Framework

TIER 1

### Threshold

Any vendor that cannot meet ALL Tier 1 requirements is eliminated before demos begin — regardless of pricing, relationship, or impressive demos.

TIER 2

### Workflow

Score each vendor 1–5 on each requirement. Weight items by your team's priorities.

TIER 3

### Technical Architecture

Requires written documentation, never verbal assurances.

TIER 4

### Vendor Health

Weight heavily. A great platform from a failing vendor is a migration you will have to make again in 3 years.

## Tier 1 — Non-Negotiable Threshold Requirements

Disqualify any vendor that cannot provide documented evidence for all of the following:

- SOC 2 Type II certification: current report, dated within 12 months, available on request without NDA barrier
- Processing throughput benchmark: documented methodology, specific GB/hour figure, tested conditions disclosed
- Uptime SLA: minimum 99.5% guaranteed, with 12 months of historical performance data

Data residency control: can guarantee data stays in a specified geography/jurisdiction

Active matter migration methodology: documented in writing, not described verbally

Reference customers: minimum 3 in your firm size and practice type, contactable directly

## Tier 2 — Workflow Capability Requirements (Score 1–5)

CAPABILITY	WHY IT MATTERS	WT	SCORE
<b>Email threading + near-duplicate detection (native, not add-on)</b>	Reduces review volume by 20–40% on typical matters. If it costs extra, it will not get used.	—	—
<b>TAR / Predictive Coding: CAL and SPL models</b>	CAL handles variable recall; SPL handles fixed-seed workflows. You need both.	—	—
<b>Concept clustering and analytics dashboard</b>	Allows case assessment before review begins. Changes how you scope and budget matters.	—	—
<b>Bulk redaction with automated PII detection</b>	Manual redaction at scale is a liability. Bulk tools with QC workflow are table stakes.	—	—
<b>Privilege log auto-generation from coded documents</b>	Eliminates the most time-consuming post-review manual task in most workflows.	—	—
<b>Production templates (reusable, version-controlled)</b>	Every custom production spec should be a saved template, not rebuilt from scratch.	—	—
<b>Real-time billing / cost dashboard per matter</b>	If you cannot tell a client what they have spent at any moment, you have a billing risk.	—	—
<b>Native cloud data ingestion (M365, Google, Slack, Teams, Zoom)</b>	Third-party collection tools introduce workflow and chain-of-custody risks.	—	—

## Tier 3 — Technical Architecture

🛡️ API availability: REST API with published documentation, not 'available on request.'

🛡️ SSO/SAML integration: compatible with Okta, Azure AD, Ping, etc.

🛡️ Active Directory sync: user provisioning and deprovisioning driven by your directory

🛡️ Export format compatibility: confirm receiving parties' platforms can ingest what this vendor produces

🛡️ Encryption standards: AES-256 at rest, TLS 1.2 minimum in transit

🛡️ Audit log completeness: user actions, data access, processing events — all logged and exportable

## Tier 4 — Vendor Health

✅ Company ownership and stability: privately held, PE-backed, or public — and how that affects roadmap investment

✅ Support model: named Customer Success Manager, or pooled support?

✅ Support SLA with historical data: actual P1 response and resolution time metrics for the last 12 months — not SLA targets

✅ Product roadmap transparency: 12-month roadmap available; track record of delivering against the previous one

✅ Customer input process: formal mechanism for customer feature requests to reach the product team



# How to Run the Vendor Evaluation

Follow this four-stage process and you will end with a documented, defensible decision — not a gut feeling from three impressive but incomparable demos.

## 5.1 The Evaluation Process in Four Stages

1

### Long List

1-2 WEEKS

Identify 4-6 vendors via referrals, analyst coverage, G2/Capterra. Apply Tier 1 as a filter.

**Output:** 3-4 vendors advance to RFP

2

### RFP

2-3 WEEKS

Send a written RFP requiring documented responses. Score against your weighted requirements.

**Output:** 2-3 vendors advance to demo

3

### Scripted Demo

1-2 WEEKS

Provide a demo script. Each vendor follows it on the same sanitized data set.

**Output:** 1-2 vendors advance to pilot

4

### Paid Pilot

60-90 DAYS

60-90 day pilot on a real closed matter with full production capabilities and real support interaction.

**Output:** Final selection decision

## 5.2 Long List Red Flags — Disqualify Before You Invest Time

These signals warrant immediate removal from your long list. Do not rationalize past them:



Cannot produce SOC 2 Type II on request, or requires a signed NDA before sharing it. A vendor with nothing to hide shares security documentation freely.



No reference customers in your segment — 'we serve firms of all sizes' is not a reference. You need names, contacts, and permission to call.

⚠️ Recurring negative support patterns on G2/Capterra. One or two negative reviews are normal. A pattern of 'support disappeared after signing' is a vendor culture signal.

⚠️ Recent acquisition or PE ownership change frequently leads to platform consolidation. Find out what the acquirer's roadmap says before investing evaluation time.

⚠️ Inability to explain their data migration process for incoming customers — if they cannot describe how they bring data in from other platforms, they have not thought carefully about your onboarding experience.

## 5.3 The Scripted Demo Framework

Send this script to every vendor you advance to the demo stage. Require them to follow it using a sanitized data package you provide (a closed, non-sensitive matter of 10–50 GB works well). This is the only way to compare vendors against each other on the same basis.

1

### Task 1 – Ingestion

15 MIN

Ingest the provided data package. Show the ingestion job configuration, the processing progress view, and the exception report once complete. Walk us through how you would handle each exception type in the report.

2

### Task 2 – Analytics

15 MIN

Run email threading and near-duplicate detection on the ingested data. Show the results view. Then initiate a concept clustering job and walk us through how you would use the output to inform review prioritization.

3

### Task 3 – Review and Coding

15 MIN

Set up a review batch using the data set. Demonstrate the coding panel, search syntax, inline redaction, and privilege logging from coded documents.

4

### Task 4 – Production

15 MIN

Run a test production using a saved template. Show Bates endorsement, native + image output, and load file generation.

5

### Task 5 – Reporting

10 MIN

Show real-time matter cost dashboard, user activity logs, and exportable billing data.

## 5.4 Reference Check Protocol

Reference checks are systematically underused. Most teams ask a vendor-provided contact three easy questions and accept the answers. Be more rigorous — go beyond vendor-provided references. Ask the vendor for customers who have spoken at conferences, published case studies, or written about their experience publicly. These references are less coached and more candid. Also search LinkedIn for users of the platform in your professional network.

### The Four Questions That Reveal the Most

- 1 Tell me about the migration experience. What did they do well? What would you have done differently if you had known what you know now?
- 2 Tell me about the last time something went wrong — a processing failure, a missed deadline, a support issue. How did the vendor respond?
- 3 When you signed, the vendor made certain promises about the roadmap or specific features. Did those promises materialize?
- 4 If you were starting the evaluation today, would you choose this vendor again? What would make you hesitate?

#### THE SIGNAL

That last question is the most important. The pause before the answer often tells you more than the answer itself.

# The Migration Playbook: Phase by Phase, Week by Week



A well-run eDiscovery migration is not an event — it is a project, typically 60 to 180 days depending on data volume, complexity, and organizational bandwidth. This chapter gives you the phase structure, key tasks, and the decision gates that separate a clean migration from a chaotic one.

## The Five Phases at a Glance

### Phase 1 — Pre-Migration Audit

WEEKS 1-3

Inventory every matter. No data moves until you know exactly what you have. The matter inventory is your chain-of-custody record — not bureaucracy, professional protection.

### Phase 2 — Environment Setup & Parallel Testing

WEEKS 3-6

Configure every setting, template, and integration in a staging environment. Test with non-sensitive data before any production matter is migrated.

### Phase 3 — Closed Matter Migration

WEEKS 4-12

Always start with closed matters: lower risk, real data, real learning. Each one is practice for the active migrations to come.

### Phase 4 — Active Matter Migration

WEEKS 8-16

Treat each active matter as its own mini-project. Never batch them — plan per-matter cutover with parallel access to both platforms.

### Phase 5 — Decommission & Validation

WEEKS 14-20

Audit a 5-10% sample. Negotiate 90-day read-only legacy access. Update SOPs. Run a team retrospective.

## Phase 1 — Pre-Migration Audit (Weeks 1–3)

Do not move anything until you know exactly what you have. Rushed migrations skip this phase and pay for it when an auditor or opposing counsel asks about chain of custody six months later. The matter inventory is your chain-of-custody documentation update. Every migrated matter needs a written record of what was moved, when, what validation was performed, and who confirmed it. Without this, you have a chain-of-custody gap — a professional liability issue, not just a recordkeeping issue.







## Phase 2 — Environment Setup and Parallel Testing (Weeks 3–6)

Your new platform should be fully configured before the first production matter is migrated. This means every setting, template, and integration is tested in a staging environment with non-sensitive data.

## Phase 3 — Closed Matter Migration (Weeks 4–12)

Always start with closed matters. Lower risk, real data, real learning. Each closed matter migration is practice for the active matter migrations that follow.

### Validation Protocol — Apply to Every Migrated Matter

-  Document count reconciliation: source platform count vs. destination count must match exactly, or the discrepancy must be documented
-  Native file accessibility: random sample of 50 documents retrieved and opened in the destination platform
-  Production record integrity: all past productions accessible, Bates ranges intact, load files retrievable
-  Coded data fidelity: privilege calls, issue codes, and work-product flags carry through completely
-  User access verification: correct role-based permissions applied per matter
-  Audit trail completeness: chain-of-custody record signed and stored for every migrated matter

*Do not mark a matter as migration-complete until every item has been checked. This is not bureaucracy — it is your professional protection.*

## Phase 4 — Active Matter Migration (Weeks 8–16)

Active matter migration requires matter-by-matter planning. Do not batch active matters — treat each one as a separate mini-project with parallel access to both platforms during the cutover window.

## Phase 5 — Decommission and Post-Migration Validation (Weeks 14–20)

Decommission is not the end of the project — it is the final gate. Move through it deliberately.

1

### Post-migration audit

Randomly sample 5–10% of migrated matters for full validation protocol re-check.

2

### Legacy read-only access

Negotiate 90-day read-only access with the legacy vendor before terminating the contract.

3

### Internal documentation update

All matter templates, SOPs, and training materials updated to reflect the new platform.

4

### Legacy contract wind-down

Negotiate reduced hosting fees for archive access — most vendors agree rather than lose any contract value.

5

### Team retrospective

Document what worked, what did not, and what you would do differently for the next migration and current vendor discussions.



# Getting Your Team Through the Change

The technology is rarely the hardest part of a migration. The people are. A platform your team refuses to use is not a migration — it is a very expensive IT project that produced no operational improvement. This chapter is practical: how to communicate, how to train by role, and how to handle the staff members who are most resistant.

## 7.1 Communicate Before the Rumor Does

Migrations leak. Before you have finalized anything, someone on your team will hear that a platform change is being evaluated and will interpret it through their own anxiety. Get ahead of it.

1

### AT EVALUATION START

'We are conducting a formal evaluation of our eDiscovery platform to make sure we have the best tools available. No decision has been made. We want your input.' Ask for a short survey on current pain points — this turns staff into stakeholders, not bystanders.

2

### AT VENDOR SELECTION

'We have selected [Vendor] for a pilot. Here is why. Here is what the pilot will involve. Here is what does not change until the pilot is complete.'

3

### AT CUTOVER

'Here is the specific timeline. Here is who your go-to person is for questions. Here is what parallel access means and how long it lasts. Here is how you tell us if something is wrong.'

4

### WEEKLY DURING MIGRATION

A 5-line status email. Teams fill information vacuums with anxiety. Even 'no change this week' is reassuring.

## 7.2 Role-Differentiated Training: Match Depth to Need

ROLE	FOCUS	FORMAT	TIME
<b>Platform Administrator</b>	Full configuration: user management, processing setup, billing, audit logs, integration management	Live instructor-led + hands-on lab	12-16 hours
<b>Litigation Support Analyst</b>	Processing, exception handling, analytics setup, production configuration, reporting	Live instructor-led + supervised practice matters	8-12 hours
<b>Document Reviewer (Attorney/Paralegal)</b>	Review interface, coding panel, search syntax, inline redaction, privilege logging	Short live session + on-demand video library	3-4 hours
<b>Practice Group Leader / Partner</b>	Reporting dashboard, matter cost view, production status only	30-minute walkthrough + on-demand reference	30-60 minutes
<b>IT / Security</b>	Admin console, SSO configuration, audit log access, backup/recovery procedures	Vendor-led technical session	4-6 hours
<b>Billing / Finance</b>	Matter cost reports, billing export, volume dashboards	30-minute walkthrough	30-45 minutes

## 7.3 The Champion Model: Your Most Effective Training Tool

Identify two or three team members who are enthusiastic about the new platform and invest in making them deeply proficient early. These champions become your embedded trainers — answering peer questions in real time, modeling confident platform use, and normalizing the learning curve for skeptical colleagues.

### WHY CHAMPIONS WORK

Champions are more effective than external trainers for peer adoption because they have credibility that an outside vendor cannot give: *"I was skeptical too. Here is what changed my mind. Here is the shortcut I found."*

## 7.4 Handling Resistant Staff

Some resistance is rational — these team members may have institutional knowledge about workflow dependencies the migration plan has not accounted for. Listen to them specifically. Their objections often surface real risks.

Other resistance is anxiety about learning something new. For these team members: pair them with a champion, give them a low-stakes matter to practice on, and give them explicit permission to be slow at first. Most anxiety-based resistance dissolves after 2–3 weeks of supervised use.

The rare team member who actively undermines the migration — by spreading fear, refusing training, or sabotaging adoption — requires a direct, private conversation about expectations. This is a performance management issue, not a change management issue.



# The Seven Mistakes That Break Migrations

These are the failure patterns that appear repeatedly across eDiscovery platform migrations. Knowing them in advance is the closest thing to a guarantee of a clean migration.

1

## Mistake 1 – Big-Bang Migration

Moving all matters simultaneously maximizes disruption and eliminates your ability to learn and correct course. Phase your migration — closed first, then active by priority. A single failed matter migration is a recoverable event. A failed firm-wide cutover is not.

2

## Mistake 2 – No Data Cleanup Before Migration

A migration is not a data cleanup project, but it should follow one. Orphaned matters, duplicate custodians, inconsistent coding schemas, and unresolved processing exceptions all travel with your data to the new platform. They do not disappear at the boundary. Spend 2–3 weeks on data hygiene first.

3

## Mistake 3 – Skipping the Chain-of-Custody Update

Every matter that moves platforms needs a written chain-of-custody update documenting what moved, when, and what validation was performed. This is your professional protection if a migrated matter is ever subject to forensic examination, audit, or opposing counsel challenge.

4

## Mistake 4 – Setting the Cutover Date Before the Pilot Is Complete

Leadership pressure to commit to an aggressive cutover date before validating the platform on real data is the most common cause of rushed, incomplete migrations. 'We will set the cutover date once we have completed the pilot and validated key workflow performance' is a completely defensible position.

5

## Mistake 5 – Treating Training as a Pre-Launch Event

Training that happens once, two weeks before cutover, produces initial orientation at best. Real proficiency develops over weeks of supervised use on real matters. Build 30-day and 90-day post-launch check-ins. Schedule advanced training 6–8 weeks post-cutover, when your team has real questions from real use.

6

### **Mistake 6 – Not Testing Productions End-to-End Before Go-Live**

Every plan tests document review and processing. Fewer test productions. Before your first live production deadline: run a complete test production through your standard templates, verify Bates formatting and endorsements, validate load files, and confirm your receiving party's platform can ingest the output. Discovering an incompatibility at 11 PM the night before a deadline is entirely preventable.

7

### **Mistake 7 – Switching Off Legacy Access Too Quickly**

Your legacy platform cannot be switched off on migration day. You will need historical access for appeals, audits, privilege amendments, and the inevitable 'where is that document from the Johnson matter' call four months later. Negotiate 90-day read-only access before terminating the contract.

#### **THE PATTERN**

Each of these mistakes is a shortcut taken under leadership pressure. Knowing them in advance gives you the language to push back — and the credibility to be heard.

# How Venio Systems Supports Your Migration



If you have read this far, you are serious about making a change. This chapter tells you specifically what Venio does, who we serve best, how our migration program works in practice, and what to expect from a partnership with us. We will not claim we are the right fit for every organization — we will tell you exactly who gets the most value from Venio, and let you decide whether that sounds like your team.

## 9.1 Who We Serve Best

ORGANIZATION TYPE	WHY VENIO WORKS WELL HERE
<b>Mid-to-large law firms (50–1,000+ attorneys) managing eDiscovery in-house</b>	High matter volume, diverse data types, and billing complexity are exactly what Venio's platform is architected for. Real-time cost visibility and reusable production templates reduce the overhead that typically scales linearly with matter volume.
<b>Corporate legal departments with recurring litigation or regulatory exposure</b>	Defensible, auditable process documentation is built into every workflow. Our TAR and analytics tools make large-scale review economically viable for internal teams that do not have the luxury of outsourcing every review.
<b>Litigation support service providers managing multiple clients</b>	Multi-matter, multi-client administration with matter-level billing separation, configurable permission structures per client, and white-labeling options for client-facing portal access.
<b>Government and regulated-industry legal teams</b>	FedRAMP-ready infrastructure, strict data residency controls, AES-256 encryption, and comprehensive audit logging that supports FOIA compliance, regulatory investigation response, and internal audit requirements.

### An Honest Note on Fit

If you are a small firm handling occasional, low-volume discovery matters, Venio may be more platform than you need. We will tell you that directly rather than oversell you into a deployment that does not match your scale. We would rather you make the right choice and refer colleagues to us than sign a contract that leaves both sides disappointed.

## 9.2 The Venio Platform: What It Actually Does

### Processing and Ingestion

Venio's processing engine handles the full modern ESI spectrum natively: email (PST, MBOX, EML, NSF), mobile extractions (iOS, Android via UFED and GrayKey output), cloud data exports from Microsoft 365, Google Workspace, Slack, Teams, and Zoom, structured data and database exports, and custom enterprise data sources via our ingestion API.

Our parallel processing architecture scales dynamically to data volume. There are no overnight queues on large matters; processing scales to the job, not the other way around. We publish our throughput benchmarks with full methodology disclosure. Ask us for them.

### Analytics and TAR

Concept clustering, email threading, near-duplicate detection, and a native TAR engine supporting both continuous active learning (CAL) and simple passive learning (SPL) workflows are included in the base platform, not priced as add-ons. The TAR engine's model decisions are transparent and exportable, which is increasingly important as courts scrutinize TAR validation methodology.

### Review

A configurable review interface with customizable coding panels, inline bulk redaction with automated PII detection, privilege log auto-generation from coded documents, and a QC workflow that allows supervisors to see and correct reviewer decisions in real time.

### Production

Every production format your clients and courts will ever require: native, TIFF, PDF, Concordance, Relativity, EDRM XML, and fully custom load file specifications. Production templates are reusable, version-controlled, and auditable. Test productions before live matters are standard practice, not an additional service.

### Billing and Reporting

Real-time matter cost dashboards: data volume, processing costs, hosting fees, and user activity, all visible in the platform and exportable to the major legal billing systems (Aderant, Elite, Clio, and others). If you can tell a client their matter cost in real time right now, Venio will not change that. If you cannot, Venio will fix it.

## Security

SOC 2 Type II certified (current report available on request, no NDA required). AES-256 encryption at rest and in transit, TLS 1.3. Role-based access control with field-level permission granularity. MFA is enforced across all accounts. SSO/SAML compatible with Okta, Azure AD, Ping, and other major identity providers. Full audit logging of all user actions, data access events, and processing jobs, exportable for compliance and investigation purposes.

## 9.3 The Venio Migration Program

### Step 1: Migration Assessment (Complimentary, No Commitment)

Before any contract discussion, Venio's implementation team conducts a free migration assessment: data volume inventory review, data format analysis, integration mapping, and a customized migration timeline with phase recommendations.

This results in a written migration scope document, yours to keep regardless of whether you choose Venio. Scheduling takes 5 business days from the time your request is received.

### Step 2: Paid Pilot (60-90 Days)

Every Venio deployment begins with a paid pilot on a representative closed matter. Full platform capabilities, real support interaction, and real data. This is not a sandbox, it is a production environment with your data. You validate processing speed, analytics performance, production output quality, and support responsiveness under real conditions before any multi-year commitment.

### Step 3: Dedicated Migration Manager

Every Venio migration is assigned a dedicated Migration Manager, not a general support resource. Your Migration Manager has eDiscovery domain expertise, not just technical expertise. They understand chain-of-custody requirements, production workflows, and the stakes in active litigation. They are your single point of contact from contract signing through 90 days post-migration.

## **Step 4: Matter-Level Validation and Sign-Off**

Every matter migrated to Venio is validated against a documented checklist: document count reconciliation, production record verification, native file accessibility, coding schema mapping, and chain-of-custody documentation update. Your team signs off on each matter before it is marked migration-complete. Nothing is marked done until you say it is done.

## **Step 5: 90-Day Parallel Access Guarantee**

Venio guarantees read-only access to your prior platform's data for any matter migrated to Venio for at least 90 days post-cutover. We coordinate directly with your legacy vendor on access terms. You are never cut off from historical data before you are ready.

## **Closing: The Migration Decision Is a Leadership Decision**

Every experienced litigation support professional eventually reaches the same realization: your platform is not just a software choice. It is a statement about how your organization values the people doing eDiscovery work, the clients depending on a defensible process, and the cases that deserve the best available technology.

Legacy platforms persist not because they are the best choice, but because migration feels harder than staying put. This guide exists to close that gap. The teams that treat their technology stack as a competitive advantage rather than a necessary cost are consistently faster, more accurate, and more profitable than those who do not.

Whatever platform you ultimately choose, we hope this guide made your evaluation more structured, your business case more persuasive, and your migration less stressful.

If that platform turns out to be Venio, we look forward to earning your trust, one well-migrated matter at a time.



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