



Laney Schatz—senior litigation paralegal and litigation support analyst at Solomon Ward

Solomon Ward Reduces E-Discovery Cost and Risk for Clients with Hosted Summation in the Cloud

Solomon Ward's relationship with AccessData dates to 2008, when the firm began cultivating its in-house e-discovery capabilities by purchasing the iBlaze® software product, which was subsequently redeveloped into Summation Pro.

Laney Schatz, senior litigation paralegal and litigation support analyst at Solomon Ward, was put in charge of managing the firm's e-discovery workflow. She had extensive experience with several leading e-discovery tools—including Clearwell®, Concordance® and EnCase®—and recommended the firm install AccessData's Summation® product as its single

platform for managing the e-discovery workflow, from processing to production.

"We worked closely with AccessData to accomplish an initial installation and provided them with a steady stream of feedback, as well as feature requests ranging from additional filtering capabilities to assistance with implementation of our new workflow," said Schatz. "Their team was responsive and engaged. Soon—just a few weeks in—we were running smoothly on the new platform and were able to migrate our entire case load to Summation."

Customer Profile

Solomon Ward Seidenwurm & Smith, LLP, is renowned as a leading-edge law firm that uses technology to support client service. The firm was recognized with the *LTN* National Innovation Award for firms with fewer than 100 lawyers, which honored their outstanding achievement in integrating technology into legal work to help them deliver better, faster and cheaper services to their clients.

"We view our approach to electronic discovery as a competitive advantage for our law firm," said Bill Kammer, partner at Solomon Ward and head of the firm's E-Discovery and ESI services team. "Given the amendments to the Federal Rules of Civil Procedure in 2015, we aggressively scope out the potential data landscape in a case before jumping into e-discovery as the concept of proportionality means that we can now tailor e-discovery to a more narrow approach. This ensures that the work we do is defensible in the litigation lifecycle and cost-efficient for our clients."

Solomon Ward blazed trails in the way the firm collected data and leveraged its in-house capabilities to become an e-discovery powerhouse in the preservation, processing, review and production of electronic evidence. The firm is now leading the way in the adoption of cloud-based e-discovery technologies to reduce costs, save time and mitigate data security risks to their clients.

The results from their Summation adoption were excellent. As an example, in one case, a client handed the firm a terabyte of data on 14 hard drives produced by 14 custodians. Schatz's team had to import, review and process the data into rolling productions for opposing counsel prior to the imminent start of depositions. The entire process took just 18 hours, a dramatic time savings from the one week required with their previous workflow. In another case that revolved around a dispute involving contract negotiations, the Solomon Ward litigation team used Summation email visualization tools to construct a timeline that illustrated important relationships within collected emails based on metadata. In another matter that involved a high-stakes employment dispute, Schatz's team identified undisclosed email aliases used by the opposing plaintiff.

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"Since implementing Summation, we are able to ingest and process data at costs that are greatly reduced, compared to the rates of most current litigation service providers," said Kammer.

Not content to rest on these achievements in efficiency for their clients, however, Solomon Ward's partners observed an important convergence of industry trends in 2017. On the one hand, the firm's capital expenditure requirements to acquire and maintain the significant IT hardware and other systems continued to soar. At the same time, the e-discovery marketplace began to evolve as software vendors and managed services providers developed the technology to support cloud-based e-discovery.

"The emergence of cloud-based electronic discovery is a tremendous breakthrough for law firms of all sizes, but especially those of us who do not have the depth of resources that the world's largest firms possess," said Kammer. "The serious requirements now involved to own and maintain hardware, data storage and data security systems are both costly and risky.

The SaaS-based model represents a great alternative e-discovery strategy for law firms that are willing to innovate and chart a new course.”

Solution

In 2017, Solomon Ward embarked on a deliberate initiative to select an e-discovery software partner that could help them move from an on-premises, in-house model to a hosted model. After conducting their due diligence, the firm settled on two potential providers: AccessData and Ipro.

“We built a team of seven beta testers inside the firm and launched a 30-day, head-to-head testing of Hosted Summation vs. Ipro in a hosted environment,” said Schatz. “We put both products through ‘stress tests’—with

- Need to collaborate on a case with co-counsel and share data securely;
- Received a very large dataset for a single case and cannot host it internally; and/or
- Want software updates, backups, monitoring and upgrades included at no additional charge.

“Our beta testers felt Hosted Summation was vastly superior to Ipro under identical performance conditions,” said Schatz. “The software was quick and we observed few errors in the processing engine, which was impressive.”

Solomon Ward selected Hosted Summation as their cloud-based e-discovery platform in the fall of 2017 and deployed it in January 2018.

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identical conditions and identical test matters—to see how they performed under intense real-world circumstances.”

After the 30-day test, the verdict was unanimous: Hosted Summation was the clear winner.

Hosted Summation is the SaaS-based delivery model for law firms that wish to have access to the robust e-discovery capabilities of Summation without having to purchase and maintain additional hardware or new software. The application is hosted by a trusted partner and is ideal for firms that:

- Do not have deep internal IT support to deploy and manage the software and hardware required;

Results

Solomon Ward has successfully blazed a new trail once again with its migration to a cloud-based e-discovery model in its switch to Hosted Summation. The firm has fed a number of cases through the hosted platform since January 2018, with one especially notable case study standing out to illustrate the benefits from the new strategic direction for e-discovery.

“We recently represented a company co-defendant against allegations of default under secured promissory notes, foreclosure of collateral and breach of contract, among other things,” said Schatz. “This was a multimillion-dollar dispute and the stakes were high for our client.”

The entire e-discovery workload was run through Hosted Summation:

- Number of custodians: 11 (across two defendant companies)
- Data ingested into Hosted Summation: 202.6 GB compressed, 19 PSTs

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- Number of records ingested for review: 1,159,918
- Number of search terms run: 47
- Number of records produced: 1,715
- Number of pages produced: 7,836

The Solomon Ward workflow was seamless. They ran a privilege screen across all data, coding and excluding from review sets. Next, they updated the tracking chart for privileged records and then applied date restrictions around non-privileged data prior to running search terms.

The team reviewed the analytics and updated the cast list with custodians, then ran the search terms to eliminate multiple email threads, coding the last email in the thread for production. Then, they updated the tracking chart once again with the number of hits and records returned for each search term. Finally, they made rolling productions.

“Our team was very pleased with the performance of the software in the hosted environment and the new e-discovery workflow we put in place,” said Schatz. “The transition to Hosted Summation made it much easier for our team to manage the e-discovery workflow without the data security risks and expenses that we would have incurred with our previous model of hosting everything on our own.”

The matter was settled by all parties, to the satisfaction of Solomon Ward’s client, for a fraction of what the plaintiffs were seeking to recover.

Kammer notes that clients simply cannot afford to have lawyers read every single document to determine if they’re privileged, so e-discovery software tools are a prerequisite for law firms. At the same time, the changing economics of the legal services industry are placing pressure on law firms to mitigate risks associated with cybersecurity and reduce costs associated with IT infrastructure. The innovative model embraced by Solomon Ward of migrating to a SaaS model for managing e-discovery addresses both trends with one solution.

“We’re much better off having AccessData handle these e-discovery technology responsibilities for us and allowing our team to focus on what we do best, which is to serve our clients and to practice law,” said Kammer.



Whether it’s for investigation, litigation or compliance, AccessData® offers industry-leading solutions that put the power of forensics in your hands. For over 30 years, AccessData has worked with more than 130,000 clients in law enforcement, government agencies, corporations and law firms around the world to understand and focus on their unique collection-to-analysis needs. The result? Products that empower faster results, better insights, and more connectivity. For more information, visit www.accessdata.com

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