



Legal Service Providers

Enterprise eDiscovery project management built for service providers operating at scale.

A Centralized Command Center for eDiscovery

IS-A-TASK is a state-of-the-art legal operations management platform designed to orchestrate repeatable workflows, centralize visibility, and deliver defensible oversight across the entire eDiscovery lifecycle. Built on a secure, stateless AWS cloud architecture and designed with an API-first framework, IS-A-TASK provides elastic scalability and seamless integration with critical enterprise systems, including Microsoft 365. The result? A unified command center that connects custodians, sources, collections, downstream processing statistics, budgets, billing and reporting into one centralized, defensible system.

Built for the Complexity Service Providers Manage Every Day

Legal service providers support increasingly complex discovery matters across law firms, corporate legal departments, and government agencies – all under strict cost, timeline, and defensibility pressures. IS-A-TASK delivers the secure, centralized oversight needed to align operations with how legal teams initiate, manage, and evaluate discovery work.

PLATFORM FEATURES

API-First Orchestration Layer

Designed as an API-first legal operations platform, IS-A-TASK embeds into your existing legal technology ecosystem as a governance and visibility layer without replacing core tools.

Cloud-Native, Stateless AWS Architecture

Foster collaboration across all project stakeholders with full transparency including external teams who are performing the work.

Microsoft 365 & Purview Integration

Secure API integration with Microsoft 365 and Purview eDiscovery automatically captures custodians, source locations, and collection metrics in real time, eliminating manual exports and strengthening defensibility.

Defensibility & Chain of Custody

Maintain a complete, centralized audit trail of custodians, sources, task activity, and reporting to support compliance, audit readiness, and legal defensibility.

Budget, Billing & Cost Control

Integrated billing, case budget alerts, and real-time cost tracking provide financial transparency and improved predictability across discovery matters.

Enterprise-Grade Security

Aligned with NIST-based Secure Software Development Framework practices, IS-A-TASK supports secure SSO authentication, granular permissions, and strict governance controls.

Automated Legal Workflows

Automate case intake, custodian tracking, and collection statistics to reduce manual entry, improve efficiency, and ensure repeatable, defensible processes from day one.

Configurable, Repeatable Workflows

Standardize execution with customizable workflow templates, structured intake forms, SLA tracking, and role-based portals that align to your operational model.

Advanced Reporting & Dashboards

Interactive dashboards and customizable reports deliver real-time insight into processing metrics, resource utilization, SLA performance, and matter progression.



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Example Legal Service Provider Workflow

Reporting

Project Managers can report on what witness sources were processed; how much was processed and what was produced. They can pull reports on the activity of each task and the overall progression of the project. Team level service level agreements can be created and managed through IS-A-TASK, holding teams accountable to increase productivity and reduce overall project spend.

CRM

IS-A-TASK's integrated CRM serves as a central hub for managing prospects and client relationships throughout the sales cycle. Prospect information, communications, and handoffs are captured in one system, allowing service providers to seamlessly transition opportunities into active clients with full continuity.

Case Initiation

IS-A-TASK maintains individual case portals that are bound by specific user privileges. These case portals allow you to manage case contacts, productions, projects and documentation all in a central location for then entire legal case team to access and collaborate.

Billing, Invoicing & Time Tracking

IS-A-TASK offers integrated billing, invoicing and time tracking. Manage Client or Case preferred price lists to generate invoices in real-time or scheduled for on-demand budget reviews.

Work Execution

IS-A-TASK maintains individual internal or external team portals that are bound by specific user privileges. These team portals allow you to assign tasks, perform the required work, track progress, add comments and record any post statistical information regarding the tasks prior to completion.

Request Initiation

Case Managers receive a request from an attorney via email to IS-A-TASK's Request module. From IS-A-TASK's case portal, the Case Manager creates a project by selecting a predefined workflow template, fill out all project instruction details, attaches the related source information and submits the project to the Operation Team. Workflow templates allow for a streamlined repeatable process to ensure more accurate on-time deliverables.

Source Management

Service Providers receive project requests containing data that appears on a variety of media streams. With IS-A-TASK's Source module, each type of media stream can be cataloged and associated with downstream project activity in an organized and secure chain of custody and defensible process.



About Inovitech

Founded in 2011 by eDiscovery and legal technology expert Debra Rozier, Inovitech was created to transform how legal teams manage complex discovery workflows. Built from decades of hands-on experience across corporate legal departments, law firms, government agencies, and service providers, its flagship platform, IS-A-TASK, is a purpose-built legal operations solution designed to eliminate inefficiencies, increase transparency, strengthen defensibility, and improve collaboration. Headquartered in Washington, DC, Inovitech serves a diverse client base, including the U.S. Securities and Exchange Commission, and remains committed to delivering smarter, more intuitive technology that empowers legal professionals to work with greater clarity, control, and confidence.



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