



# Law Firm

## eDiscovery Legal Project Management

### One Portal to Manage Enterprise eDiscovery Projects

Law Firms are responsible for creating an eDiscovery process plan for an organization that is involved in a litigation matter. An eDiscovery process plan may involve the preservation, identification, up through the presentation phase defined in the EDRM model (edrm.net).

Law Firms often have in-house expertise to assist with creating an eDiscovery process plan that is cost effective and budget conscience for their client. In addition, they rely on external vendor relationships to assist with managing eDiscovery tasks that exceed specific data collection requirements.

IS-A-TASK is an enterprise legal project management application designed to help law firms shape best practices when managing highly transaction eDiscovery tasks.

IS-A-TASK is an agnostic application meaning that it can easily integrate within any organization regardless of what eDiscovery tools are currently used.

IS-A-TASK's capabilities includes highly configurable workflows, comprehensive capture and tracking of project details and source inventory management that

is sufficient for chain of custody and defensibility requirements. It also offers ease of integration that effortlessly accommodates the demands of today's hybrid work environment where in-person and remote collaboration increasingly coexist

The IS-A-TASK solution offers exceptional value and flexibility with a choice of SasS cloud or on-premise installation, convenient subscription-based pricing, and a mature feature set shaped by Inovitech's 12 plus years of market and client experience.

#### How IS-A-TASK Can Help



##### Centralized Project Management

Consolidate and manage eDiscovery investigation projects in a secure centralized application allowing for a tighter collaboration between case managers and internal/external teams performing the work.



##### Scope Management and Collaboration

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



##### Seamless Adoption

Law Firms can transition from a variety of current tools used to manage eDiscovery projects to one comprehensive, integrated, and secure enterprise solution.



##### Chain of Custody Management

Ensure chain of custody and defensibility for all types of witnesses and media sources to allow for a complete audit trail of project activity.



##### Cost Containment

Maintain cost control across all case activity with a highly configurable system designed to streamline workflow, create repeatable processes and deliver more accurate and on-time projects.



##### Minimized Risk

Having an enterprise solution where all project stakeholders can come together and collaborate with structured workflows and full transparency helps organizations increase efficiency.



##### Maximized Control

With a comprehensive set of permissions that are highly configurable, managing the delegation of work across internal and external teams increases work productivity.



##### Informed Decision Making

Maintaining a central solution for all case activity provides real-time reporting on active cases. This helps users with on-the-fly decision making, and it benefits the retrieval of historical information that can be used on future cases.



##### User Friendly

With an intuitive interface that is highly configurable with Accessibility options allows each user to customize their own navigational experience.



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## Example Law Firm Workflow

### Reporting

Case 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.

### Billing, Invoicing & Time Tracking

IS-A-TASK offers integrated billing, invoicing and time tracking. Manage Client or Case preferred pricelists 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.

### 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.

### Discovery Phase

During the Discovery Phase of a legal case, witnesses are identified and documents are requested. IS-A-TASK can catalog all identified witnesses and their source location. Tracking this information in an organized central location provides a chain of custody when having to perform all downstream eDiscovery processes.

### 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.



## About Inovitech

Inovitech is a woman-owned company founded in 2011 by industry veteran and innovator Debra Rozier. The company specializes in building cloud-computing business applications for legal professionals. Its marquee platform, IS-A-TASK, is a legal project management application initially launched in 2014 after two years of intensive development. Inovitech recently celebrated its 9<sup>th</sup> major release of IS-A-TASK in March 2023. Headquartered in Washington, DC, the company serves a mix of corporate, law firm, eDiscovery service providers and government clients, including the U.S. Securities and Exchange Commission. Inovitech's founder, Rozier, was recently named one of the "50 Women to Watch" by Corporate Counsel Business Journal.

