

A managed review delivered a quarter million dollars under budget.

Summary

Client industry: Energy / Utility

Business challenge: One project manager and 100+ document review attorneys to review nearly one million complex documents in one month.

Highlights/outcomes: Project was completed on time and \$250,000 under budget.



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Opportunity

A large energy company found itself embroiled in a contentious regulatory proceeding that required the review of one million documents within a month.

The subject matter was complex and technical, and many of the documents required thorough redaction in order to protect sensitive proprietary information.

The client engaged Special Counsel as a preferred partner to work with their outside counsel and conduct a managed review with a strict deadline.

Business Challenges

Special Counsel understood the client's need for cost certainty pertaining to this expensive high-profile case and recommended a per-

document pricing structure. This arrangement provided the client with added assurance that they would stay within budget, regardless of the complex subject matter and length of documents to be reviewed.

Hosting the review in a nearby, low-cost market provided additional savings to the client. The available technology in our TurnKey Legal Center allowed outside counsel to interface with the team as if all parties were working together in one location.

Immediately, the Project Manager recognized the technical subject matter inherent in the case and carefully selected reviewers with pertinent scientific backgrounds. Once in place, the team received robust and substantive training.

“We could not have done this without the Special Counsel Project Manager and Review Team. Their attention to detail and overall dedication to this case is illustrated by the strong work product yielded.”

- Outside Counsel's Lead Partner

Engagement / our solution

Prior to the launch of the Managed Review, the Project Manager assessed the review protocol, proposed workflow and provided feedback to the client and outside counsel. To further ensure an efficient kickoff, the Project Manager collaborated with outside counsel to clarify review instructions, field and answer questions and confirm that Special Counsel's stringent quality control process was adhered to by the review team.

To create consistent tagging and an accurate work product, the Project Manager routinely updated and distributed the decision log with substantive guidance based on counsel's ongoing feedback.

Special Counsel executed a precise quality control process tailored to the advanced subject matter of the case. During the first week of the review, the Project Manager, along with the Quality Control Team, reviewed 10% of the documents. The Project Manager then investigated the errors and found that 83% of the mistakes were made on highly scientific and specific subsets of documents that represented three topic areas. With the approval of outside counsel, the Project Manager arranged for a subject matter expert to train the 100+ reviewers on those topics, which

immediately resulted in a double digit decrease in the error ratio.

In the early stages of the review, outside counsel conducted their own quality control on the documents reviewed by Special Counsel. However, counsel quickly gained confidence in our accuracy, and reduced their quality control activity in order to focus on the substantive merits of the

case. In the final stages of the review, the Project Manager also developed additional targeted searches which included sweeps in the database to further demonstrate consistent coding.

Biweekly status calls were hosted with the client and outside counsel to provide clarity and updates on the progress of the review.

Offering additional detail and communication, the Project Manager composed comprehensive daily reports that contained critical metrics, including the number of documents reviewed, the number of documents remaining to be reviewed and other relevant data.

The Project Manager also created and assigned batches of documents, ran searches in the database and distributed a glossary of industry

“The feedback from my Outside Counsel has been nothing but praise for the Special Counsel team... I truly appreciate all of their assistance in ensuring that the deadline was met and the fact that the project was completed \$250,000 under budget was definitely a win for my company internally.”

- Client's Senior Counsel

terms and acronyms to help the reviewers understand the content. Through this process, the Project Manager identified search terms that were not associated with responsive documents and removed several search terms from the filtering process. This measure removed ten percent of the document universe from the review, significantly reducing the cost of the project.

Outcomes / highlights

Special Counsel reviewed 910,901 documents with 12% undergoing our standardized and extensive quality control process, resulting in a 97.3% accuracy rate.

Special Counsel's focus on quality, communication and transparency allowed the project to be completed on time. With the Project Manager's initiative and insight, Special Counsel greatly reduced the client's overall costs associated with the project. The isolation of the topics requiring additional training alone saved the client over \$75,000. In total, this successful review was delivered at \$250,000 under budget.

