

# EDISCOVERY PLANNING CONSIDERATIONS & CHECKLISTS

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# EDISCOVERY PLANNING CONSIDERATIONS & CHECKLISTS

## 1 / ESI PROTOCOL

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### ★ BENEFITS OF A PROTOCOL TEMPLATE

Implementing a standard ESI protocol for your firm can seem daunting. However, answering a few simple questions at the outset will help you create an ESI protocol template that best fits your needs.

#### **Here are five proven benefits of standardizing an ESI protocol:**

1. You'll think through discovery for the entire matter.
2. A well-drafted protocol will protect your client's data and their interests.
3. You'll identify sources of data that require additional consideration and planning for collection and production.
4. You can leverage the protocol for third-party data.
5. It's your discovery blueprint for the case and you'll go back to it time and time again.

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**★ QUESTIONS TO CONSIDER WHEN DRAFTING**

1. Do you currently have an ESI protocol template in-house?  
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2. What type of case are you involved in currently?  
.....
3. What type of productions have you delivered/received in the past, outside of your current matter?  
.....
4. What type of venue will the proceedings be held in?  
.....
5. What type of firm(s) is your Opposing Counsel?  
(e.g. Mid/Large/Solo )  
.....
6. Where will the majority of your data be collected from?  
.....
7. Is there any proprietary software at issue?  
.....
8. Will there be any hard-copy paper documents to collect?  
.....
9. What type of metadata do you anticipate being most crucial during your review? (i.e. When v. Where v. Who)  
.....
10. Will any culling/filtering method be applicable in your case?  
.....
11. How do you want privilege and/or your privilege log handled?  
.....
12. How do you want deduplication handled?  
(i.e. Universal v. Isolated Source)  
.....
13. What are your production delivery methods and goal?  
.....

**★ ADDITIONAL RELATED CONTENT**

**[EDISCOVERY COLLECTIONS](#)**  
**[A Best Practice Guide to Managing Modern Data Collections](#)**

## ABOUT NEXTPOINT

Nextpoint is smart software that automates ediscovery projects for legal teams of every size. The highly secure, cloud-based solution lets your team begin document review in minutes with powerful data analytics tools, a user-friendly interface and collaborative access from anywhere. Innovative trial-prep features will exceed your expectations of what smart ediscovery software can do.

Founded as a litigation support company in 2001, Nextpoint introduced the world's first cloud-based litigation software a few years later. Since then, we've continued to innovate and expand to serve law firms, corporations and government agencies of all sizes. In 2013, Nextpoint was awarded U.S. Patent number 8,447,731 for our management of electronic data in the cloud, specific to litigation processes.

### ★ STOP PAYING FOR EDISCOVERY DATA

Nextpoint gives users **free, unlimited data uploads, processing, hosting, OCR, imaging and productions.** As you face increasing pressure to control costs, Nextpoint empowers users to easily process, analyze, review, produce and present data, affordably and predictably.

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