



The eDiscovery Beast: How to use Project Management Methodology to Help Gain Control

By Chontté R. Johnson, PMP

The Definition of a Project

A **temporary** endeavor undertaken to create a unique product, service or result.

Why Project Management in eDiscovery

A project manager or using the project management methodology brings guidance and best practices from prior projects to opine on the issues a client is facing in a project, helping avoid pitfalls and structure defensible solutions. Project management gives clients a repeatable and reliable process. It also allows clients to gather data and develop best practices for future matters.

This presentation will help you understand how to bring the project management methodology into your eDiscovery projects.



People, it's a two year project! That means we have 23 months to goof-off until we put something together.

The Phases of Project Management & eDiscovery

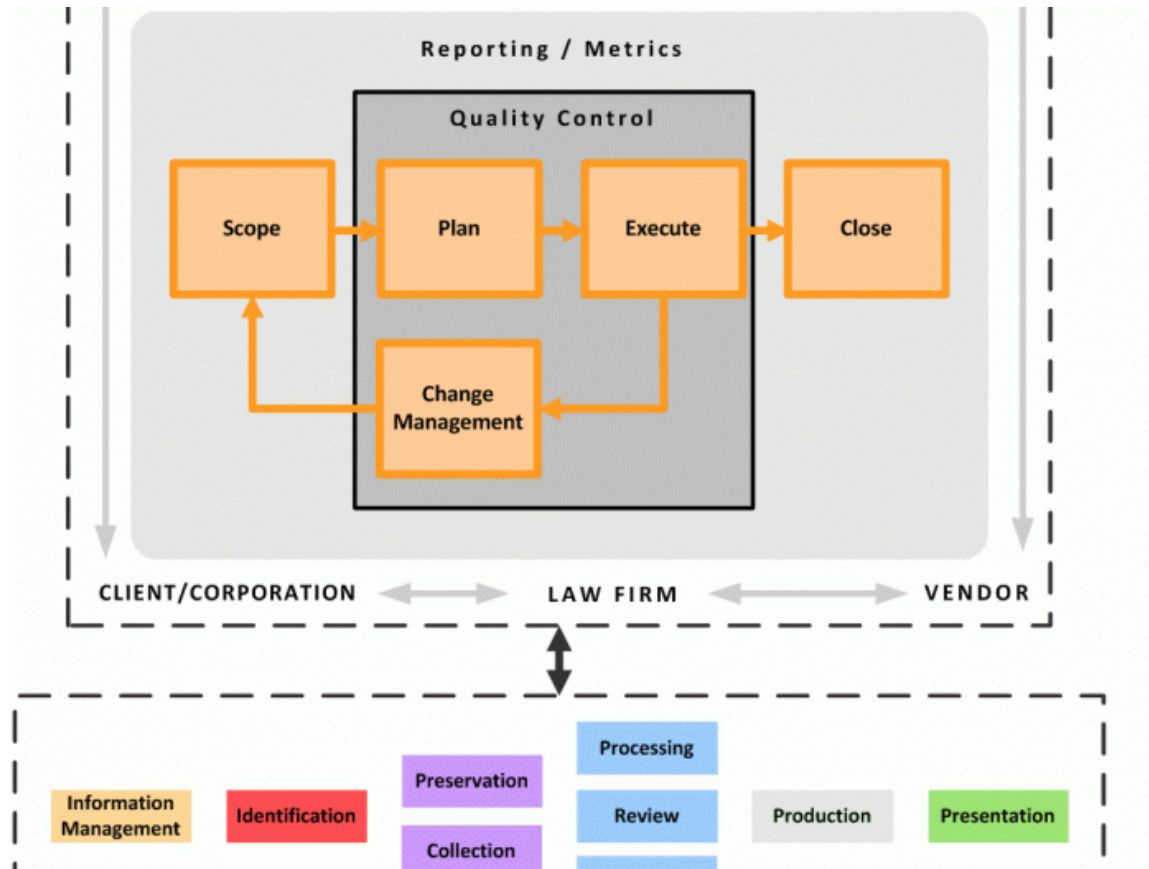
Project Management*

- Initiation
- Planning
- Execution
- Monitor Control
- Closing

eDiscovery (EDRM)

- Information Management
- Identification
- Preservation
- Collection
- Processing
- Analysis
- Review
- Production
- Presentation

Project Management & EDRM Workflow



Initiating Phase

Project Management

- Define the new project
- Identify stakeholders
- High level budget
- High level risks

eDiscovery

- Information Management
- Identification
- Preservation

Initiating

- Identify Stakeholders- Define the roles.
- Who are the stakeholders
 - In-house our outside counsel
 - Client
 - Opposing counsel
 - Custodians
 - eDiscovery service provider
 - Any other individual, group or organization who may be affect
 - This will change throughout the project
- Who will be the “Project Manager” for the case.
 - Attorney
 - Paralegal
 - IT Resource



The primary goal of this phase is to ensure everyone is on the same page.



I think we need a good Project Manager to coordinate our efforts.

Planning Phase

- Total scope of the effort
- Define & Refine the objectives
- Develop the course of action required to attain those objectives
- Communication
 - Who, When, Why & What
- Process workflow
 - Document workflow
- Quality control
- Schedule and production plans

Time Management/Schedule

Keeping the project on schedule is one of the hardest things to do.

- Managing the review teams
- Production schedule
 - Define the activities
 - Sequence Activities
 - Estimate Resources
 - Estimate Activity Durations
 - Develop schedule

© MARK ANDERSON

WWW.ANDERTOONS.COM



"I prefer the term 'time-management' to 'clock-watching.'"

Cost Management

- Estimate costs
 - Contract Reviewers
 - Service provider

You may not be responsible for managing the costs but it's a good idea to keep your eye on costs.



Risk Management

- Identify Risks
 - Issues with collecting data
 - Litigation holds executed
 - Communication gap between legal team, HR and IT
 - Not including correct stakeholders in planning
 - Contract reviewers not reviewing fast enough
- Categories Risk
 - High impact
 - Low Probability
- Plan on how to deal with the risks



Execution Phase

This is where most of the time & money is spent

Project Management

- Perform to complete the work defined in the initiating and planning stage
- Keep stakeholders updated

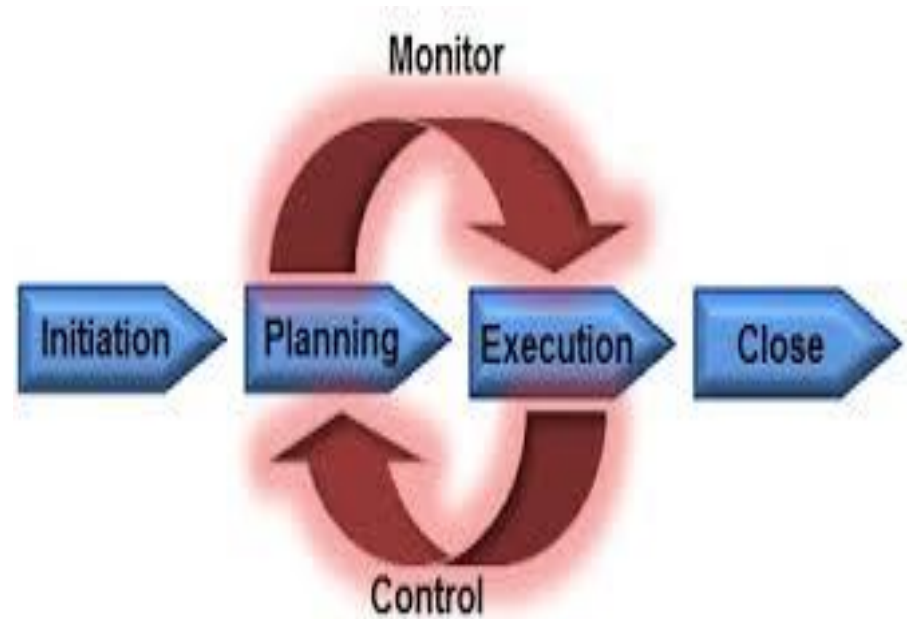
eDiscovery

- Collection
 - New stakeholders identified
- Processing
 - Document workflow
- Analysis
- Review
 - A new set of stakeholders
 - Additional reviewers
- Production
- Presentation

Monitor & Control

This process is done throughout the lifecycle of the project

- Controlling changes and Recommend corrective or preventative action
- Monitoring the ongoing project activates against the original plan
 - Stats on the review team
 - Where are you in the collection of data
 - What has been processed



Closing

All project must come to an end, it may take years, but they must come to an end.

- Document lesson learned
 - Good or bad
- Record if you tailored something specific for this project.
 - Work flow
- Update any organization processes
 - Closing documentation
- Archive all project work



Thank you!



Citing Sources:

- A Guide to the Project Management Body of Knowledge (PMBOK® Guide) Fifth Edition
- Achieve PMP Exam Success -Diane Altwies, PMP; Janice Preston, PMP
- Metropolitan Corporate Counsel – How Project Management adds Value to E-Discovery, Kelli Clark
- E.D.R.M Project Management Guide
- Cartoons and pictures from Google Images