No Room for Compromise
When regulatory demands dictate the need to preserve evidence, your legal department is expected to comply. With recurring “custodian” communications, detailed steps to follow, and strict penalties for non-compliance, legal hold requirements can be burdensome, exacting and daunting.

There’s a better alternative ... using CounselLink Legal Hold Essentials to make the whole process:

- **Automated** – with simple, more efficient ways of interacting with custodians that won’t consume valuable time and resources
- **Auditable** – by tracking and preserving all communications and responses to validate compliance
- **Integrated** – with CounselLink Matter Management capabilities, so you have complete visibility to all matter and hold details in one convenient location

Streamline and Manage a Critical and Complex Process
Special features and intuitive wizard-based tools in CounselLink Legal Hold make it easier for your legal department to:

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<tr>
<td>Gather</td>
<td>Compile and prepare accurate custodian and contact manager lists by integrating with HR systems</td>
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<td>Notify</td>
<td>Create written hold notifications that reach the right parties inside and outside your company</td>
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<td>Track</td>
<td>Record and log custodian acknowledgments for compliance and audit validation</td>
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<td>Remind</td>
<td>Automate follow-up communications and retention reminders to occur on a scheduled or ad hoc basis</td>
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<td>Survey</td>
<td>Build customized legal hold surveys and reports</td>
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<td>Protect</td>
<td>Avoid unnecessary risks associated with non-compliance</td>
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Your CounselLink Legal Hold solution also includes convenient support via phone or email for troubleshooting and issue resolution on a 24/7 basis, and access to knowledge base resources and industry-leading training programs to take full advantage of legal hold capabilities.
Key Elements of a CounselLink Legal Hold Solution

- **Legal Hold Profile**: Centralized repository for pertinent details – hold description, custodians, notification, documents and notes
- **Legal Hold Notification Wizard**: Step-by-step process to create hold notifications and acknowledgment web pages
- **Automated Hold Reminders**: Scheduled notifications reminding custodians to continue preserving relevant documents
- **Notification Delivery and Acceptance Dashboard**: High-level summary of notification acknowledgments
- **Customizable Custodian Survey**: User-definable questions presented to custodians when acknowledging a legal hold
- **Configurable Legal Hold Acknowledgement Page**: Configurable web page for custodian acknowledgements
- **Custodian Profile**: Stores custodian name, phone and e-mail address information
- **Import / Export Custodian Information**: Import / export capability for custodian details
- **Configurable Custodian Data Fields**: User-definable data fields for custodian details
- **Reporting**: Standard and user-definable legal hold reports