

LexisNexis® CounselLink®

Legal Hold Essentials

A Better Way to Protect Your Company from Unnecessary Risk and Exposure

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:

	Gather	Compile and prepare accurate custodian and contact manager lists by integrating with HR systems
	Notify	Create written hold notifications that reach the right parties inside and outside your company
	Track	Record and log custodian acknowledgments for compliance and audit validation
	Remind	Automate follow-up communications and retention reminders to occur on a scheduled or ad hoc basis
	Survey	Build customized legal hold surveys and reports
	Protect	Avoid unnecessary risks associated with non-compliance

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

Home Tools Data Grid Format

PAGE-BY: Legal Hold Title: Great Purchase Legal Hold

Custodian First Name	Custodian Last Name	Custodian has Relevant Data	Description of Data Held	Original Location of Data	Data is Preserved?	Data Preservation Location	Electronic Files?	Emails?	Paper Files?	Other Formats/Data?
Adam	Harris	Yes	I have multiple documents related to this matter on a thumb drive and a backup drive for my laptop, in addition to my laptop.	Company-issued laptop.	No		Yes	No	No	No
Alex	Summers	Yes	I have one document pertinent to case. It is a PDF relating to the exchange of funds.	Laptop hard drive.	Yes	Jake, from IT, backed up data directly to LH server (K).	Yes	No	No	No
Brad	Adams									
Cristina	Garcia	Yes	Three file drawers (J-L) containing documents I believe are pertinent to this case.	File drawers, floor 3, drawers J-L.	Yes	A member of the IT team, duly identified, retrieved the files two days ago for scanning to electronic media and for off-site storage.	No	No	Yes	No
Daniel	Petrov	Yes	I have emails pertinent to case.	Email.	Yes	IT Legal Preservation and Collection servers.	No	Yes	No	No
Joseph	Blackstone									
M.	Cao	Yes	I have paper files pertaining to Great Purchase properties.	Paper files - Real Estate office.	Yes	Joe Briggs, Legal IT, preserved to Legal IT Preservation servers.	No	No	Yes	No
Robin	Kline	No			No		No	No	No	No

The screenshot displays the CounselLink dashboard with several key metrics and sections:

- MY MATTERS:** 52
- INVOICES REVIEW REQUIRED:** 41
- Fee Offers REVIEW REQUIRED:** 30
- Recent Items:**
 - Fee Structure ID - 4820 (Fee Free HUB Visa)
 - Legal Hold - 10298517 (Day V Night)
 - Invoice - 1719985 (Associated Matter - 12786911 Gray, Heldon and Illinois Power and Light Board v. ABC Industries)
 - Matter Number - 2012-0949 (Bad McClaren, Ross Sterling v. PHA and Gimble Max Land America)
- Matters:** Active Matters within 180 Days, Contract Matters, Alex's Matters, John Johnson's Matters.
- My Matters:** Pending Resolution (0), Incomplete Setup (0), Unassigned (20), Awaiting Acceptance (6), Budget Review Required (6).
- Accruals:** Review Required (41), Open Accruals (3), Pending (0), Action Required (0).

Learn More >



www.counselink.com



866.718.3592



LNCounselLink@lexisnexis.com

