

# Automated Workflow:

INCREASING  
HUMAN  
EFFICIENCY  
THROUGH  
TECHNOLOGY



By Jennifer Freeman and Anna Mills

Over the past several years, there has been a dramatic shift in the way people communicate and store information. The days of file folders and bulging file cabinets are long gone. Today, people predominantly communicate through e-mail, instant messaging and text messaging, as well as through blogging and social networking. As a result, the amount of information involved in litigation has dramatically increased, providing a continual strain on e-discovery resources – particularly in document review.

In fact, document review remains the most costly and time-consuming part of the e-discovery process. For every \$1 to \$2 spent on ESI processing, \$3 to \$5 is spent on review. However, the inefficiencies and costs that accompany document review can be abated with adequate foresight and preparation. In fact, the newest in intelligent review technology – automated workflow – can help cut time and save on costs.

## Automated Workflow

One of the major challenges with document review is the management of document distribution and direction, which is a manual and cumbersome process. In order to assuage this procedure, intelligent review technology should include automated workflow functionality. With this technology, the review manager can create the workflow components that define the document review process and associ-

ated rules. Defining the review process in this manner, instead of using a whiteboard, piece of paper or other method, will allow the review manager to document the decision process so it can be referenced by any and all review managers in the future, and can also be used as the basis for future reviews. Once the workflow is defined, the manager can then supervise the review, monitoring progress and addressing any problem documents in an efficient manner.

Workflow technology also makes reviewers' lives easier by allowing them to check out documents and return them to the workflow process. Documents can be returned incomplete, flagged for a manager or checked-in as complete. If a document meets the check-in criteria, it can then proceed through the workflow to the next applicable stage. This automated document distribution and check-in process ensures the highest level of reviewer productivity and the lowest amount of reviewer downtime, resulting in a faster and more cost-effective document review.

## Benefits of Workflow Technology

In addition to automating a variety of manual activities by eliminating the need to manually distribute batches of documents to reviewers, workflow technology possesses other significant benefits. One major benefit is the ability to validate the consistency of review decisions using an automated document check-in system, which reduces the time spent on quality

control throughout the document review process by ensuring documents are accurately categorized. The automated ability to detect mis-categorizations in real-time expedites issue identification by providing immediate feedback to reviewers. This eliminates the time-consuming process of manually identifying mis-categorizations, as well as other errors that would otherwise not be identified until the final stages of a review.

Another benefit of workflow technology is that it provides a variety of summary and detailed views of the review progress using a series of real-time graphical reports. These reports allow the manager to view the current state of the documents by stage, reviewer group or individual reviewer. The reports also provide insight into the number of documents checked out, flagged and through a completed review, as well as statistics on individual reviewers. Using the reporting functionality within workflow eradicates the laborious tracking spreadsheets that must be maintained by managers at every step of the review.

By using automated workflow technology, review managers will see increased review project efficiency, more consistent document decision-making and a decrease in cost. Review managers will also no longer need to stay late to run status reports, worry about maintaining manual spreadsheets to track the status of reviews or run hundreds of quality control searches at the end of a review. Instead, managers can be confident that workflow technology will serve as an effective complement to the human review process. ■

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