Markowitz Herbold uses Summation® to tackle 7 terabytes of data and save its clients millions in processing and review costs

Background

Markowitz Herbold achieved its number-one ranking by taking big cases against well-armed adversaries. Fighting and winning in this arena comes with challenges, including managing large-scale, complex e-discovery databases. To address its e-discovery requirements, the firm needed a technology partner to meet key deadlines and compete with firms ten times their size.

The firm needed a solution that could easily scale when a new case exceeded its typical case size and normal day-to-day workload. They chose AccessData® Summation®, a software that has proven successful over the last several years.
Summation software is the only web-based solution that combines predictive coding, advanced analytics, comprehensive data processing, early case assessment, case management, final review and transcript management into a single platform. The software provides a real-time review platform that allows secure collaboration, regardless of where any member of the litigation team is located.

Summation offered Markowitz Herbold all of the advanced functionality they needed at a cost-effective price, and supported both in-house deployment and hosted solutions, ensuring that the firm could scale up as needed to handle larger cases.

**Business Problem**
Recently, the firm received a matter that tested the combined software and service offerings from AccessData. The new case required processing, review and export of more than seven terabytes of data. Markowitz Herbold needed both a tool that could quickly cull down the data and a trusted partner they could turn to for support.

**The Solution: Summation**
To get through an e-discovery case this large, Markowitz Herbold had to use all of the Summation capabilities. Using deduplication, the data set was halved from roughly 5.2 million documents to approximately 2.3 million, which were still too many documents to review in a linear fashion and meet required deadlines.

To further reduce the data set, Markowitz Herbold used the Summation predictive coding capabilities. For a seed set, the firm coded approximately 80,000 documents and achieved a confidence score for the seed set of 93 percent. The team then ran the predictive coding algorithm against the remaining documents. The data set was reduced from over two million documents down to a manageable 500,000. The firm was well aware of the potential scrutiny of the e-discovery process and the need to prove defensibility. AccessData worked side-by-side with the team to ensure the predictive coding results were accurately interpreted and critical documents weren’t missed.

“(AccessData) helped us anytime we were in a jam. They were much more than a vendor during this process. They were an extension of our team.”
—Greg Scott paralegal at Markowitz Herbold
With 500,000 documents left to review, Markowitz Herbold again tested Summation software’s strength.

The data was divided into two groups based on the likelihood of importance or sensitivity. The Markowitz Herbold team and their client reviewed the more crucial data, and the firm outsourced review of less sensitive data to an external firm. Markowitz Herbold then scaled the system up to 75 reviewers and supervisors. Rolling exports of the data were performed to ensure an even, smooth process.

AccessData Summation coupled with their dedicated support was the clear choice for the firm when tackling a case of this size and complexity. As a result, Markowitz Herbold was able to meet all key deadlines of the case.

**Conclusion**

The solution’s ability to scale to support such a large matter made taking on the case significantly less complicated for Markowitz Herbold. The Summation web-based platform allowed the 75 reviewers and case managers on the case to easily collaborate in real time, eliminating the risk of moving data, reducing costs, and saving time. When production and review were complete, the firm could simply scale down the reviewer licenses to match their normal day-to-day requirements. The predictive coding capabilities coupled with hands-on support from the AccessData team made it possible to break down the large dataset into a much more manageable set of documents for review, saving the firm countless hours of review time and resulting in substantial savings for the client.

“Throughout the process AccessData was there for us. They helped us with predictive coding, they helped us with exports, and they helped us anytime we were in a jam. They were much more than a vendor during this process. They were an extension of our team,” said Greg Scott, paralegal at Markowitz Herbold. “When we needed support, no matter the day or night, we had it from the highest levels at AccessData,” said Dallas DeLuca, shareholder at the firm.
Whether it's for investigation, litigation or compliance, AccessData® offers industry-leading solutions that put the power of forensics in your hands. For 30 years, AccessData has worked with more than 130,000 clients in law enforcement, government agencies, corporations and law firms around the world to understand and focus on their unique collection-to-analysis needs. The result? Products that empower faster results, better insights, and more connectivity. For more information, visit www.accessdata.com

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Left to right: Marie Park, Greg Scott, Heather Laske, and Dallas DeLuca—the team at Markowitz Herbold.