

TRANSFORM & THRIVE WITH DISCO

YOUR GUIDE TO MAKING AN
AIRTIGHT CASE FOR INVESTMENT
IN GREAT LEGAL TECHNOLOGY

Transform & Thrive



WELCOME

TO YOUR DISCO BUSINESS CASE GUIDE

This guide contains the steps you need to take in order to secure investment for DISCO's transformative legal technology, including:

- Who to involve in the process.
- How to prove/showcase the value of DISCO technology.
- How to position the unique benefits of DISCO versus alternative technologies.
- How to build a successful adoption strategy.

You will also find information to demonstrate the DISCO benefit — an all-in-one ediscovery solution that gives law firms control over their data, workflows, and costs, with a managed, turnkey infrastructure delivery model that requires no upfront investment in software or services — offering unmatched performance, ease-of-use and value.

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WHY
DISCO?

EXECUTIVE SUMMARY

TRANSFORM & THRIVE: BUILD A CASE FOR BETTER

DISCO has identified the two drivers that should influence a firm's decision to engage DISCO: the legal practice market and the DISCO difference.

These summaries can be used by attorneys and knowledge and innovation managers to make the case for investment in DISCO and demonstrate the need for improved productivity, reduced review times, and predictable pricing.

CHAPTER 1



WHY TRANSFORM? A STATEMENT ON THE LEGAL MARKET

According to the **Thomson Reuters Institute's 2022 Report on the State of the Legal Market**, law firms “must remain flexible in responding to rapidly changing events” — alongside the adaptation necessitated by the global pandemic and the prevailing shift in working conditions, “Despite expense cuts, law firms [have] increased their technology spend by 7.1% during the 12-month period through November 2021.” This adaptation, in the face of a war for talent and a generational shift in how people work, highlights one of the fundamental features fuelling continued success in legal practice: appropriate investments in technology, especially in artificial intelligence-assisted work processes that keep firms at the cutting edge of legal practice.

Firms should now look to technology that facilitates automation as well as technology that can productize expertise, deliver better outcomes, and intelligently automate and accelerate certain tasks. In its report on the **The business case for AI-enabled legal technology**, Thomson Reuters reported that large law firms (those employing over 180 lawyers) predicted AI would “become the mainstream in the practice of law within the next five years” and that for the 40% of larger law firms already using AI-enhanced tools “the timeline [had] been obliterated.”

AI-enhanced and automated legal technology will become the baseline of legal competency in the future — it's imperative that firms looking to thrive build a case for investment today or face the peril of competitive disadvantage in the future.

WHY DISCO? A BREAKDOWN OF THE DISCO BENEFITS

DISCO offers a full suite of legal tools and services designed to support the entire litigation lifecycle, from collection and processing to review to preparing evidence for trial. At its core, DISCO offers an all-in-one ediscovery solution that gives law firms complete control over their data, workflows, and costs, with no upfront investment in software or services for setup.

Together with our DISCO Review teams, you and your firm may achieve a 23% increase in review throughout, a 50%+ savings in review time utilizing our AI tools and 66% faster review utilizing DISCO Review.

DISCO combines world-class engineering with a deep love and respect for the law to deliver great legal technology:



1

DISCO Ediscovery

- Sub-second search results — even across millions of documents.
- Budget transparency — for accurate cost control and happier clients.
- Email threading saves users time and money, while also contributing to a more informed review.
- DISCO leads to an average 23% improvement in review throughput and a 260% increase in likelihood to recommend to their colleagues compared to legacy solutions.

2

DISCO Review

- DISCO’S managed review team consistently completes reviews 60% faster than the industry average with improved accuracy.
- Reduction in QC workload working with DISCO Review — on average, DISCO Review only requires quality control (QC) reviews of less than 5% of the reviewed documents compared to the industry standard 20% re-review.

3

DISCO Case Builder

- Search across all depositions, witnesses, and work product in a case in seconds to identify the best evidence faster
- Retain all team thinking and work product throughout the lifetime of the case in a single, searchable, cloud-based place, eliminating the need for the same attorneys to perform the same work multiple times
- Automate the tedious manual work required to format evidence for presentation

4

DISCO Hold

- Automate the manual work necessary to comply with preservation requirements and manage legal holds.
- Instantly notify custodians across your data ecosystem, preserve data in place with a single click, and track legal holds with a defensible audit trail — all from a single, cloud-based interface.

These stats and benefits are just a sample of the value DISCO can provide. The benefits of partnering with DISCO extend far beyond the application of the technology to discovery and review — DISCO helps attorneys and their teams manage their matters and perform functions in lightning time, satisfies regulators and courts with transparency of methodology, and helps clients manage and oversee total, upfront cost.

DISCO also provides forensic collection services to ensure a defensible collection process, discovery consulting for ESI protocols or the use of AI, and complimentary on-demand training on the DISCO systems. Furthermore, DISCO Case Builder provides a collaborative deposition review and platform that allows case teams to locate the best evidence faster from transcripts and automatically synchronized videos and quickly prepare it for use in motions or at trial.

Moreover, DISCO fosters an environment where partners and associates can spend more time on what satisfies them – practicing law – and less time on potentially unbillable admin or unrewarding rote legal tasks.

DISCO technology, services and solutions help automate the tasks that do not require human legal judgment and accelerate those that do, providing more time to focus on legal practice and case strategy.

PROJECT MANAGEMENT

PLAN TO SUCCEED WITH A FIVE-STEP PROJECT PLAN FOR LEGAL TECH ADOPTION

A project plan can be used to guide and track the execution and control of a project. This should include objectives and scope, risk and resource management, costs and execution, and key milestones plugged into an execution timeline.

The project plan is crucial: it will help all stakeholders understand relevant commitments, resources, and timeframes and it should evolve with the project.

CHAPTER 2



“

Good fortune is what happens when
opportunity meets with planning.

Thomas Edison

”

Moreover, even a simple plan will help your firm:

- Meet or exceed project expectations.
- Save time and money on adoption and execution.
- Enhance communication between stakeholders.
- Ensure firmwide transparency.
- Budget effectively.

To reap these rewards, consider building a project plan that covers five key stages:

STEP 1

Objectives and scope

Define the processes or workflows you are seeking to transform or update by investing in a partnership with DISCO — what doesn't work, what teams don't like about the status quo, and how those problems are affecting productivity, efficiency, profitability, and speed. Seek to quantify your problems with evidence from the people doing the work and by showing the impact on outcomes. For example:

Problem:

A firm is having a problem handling large document review projects, as the current process or vendor is often too slow, too complicated, and requires too much technical knowledge to enable the best use of its available features.

Impact:

- Costly delays due to the need to communicate with litigation support and the vendor multiple times per day.
- Interruption to lawyers' workflows, decreasing productivity and efficiency.
- Increased time and expense to find the key facts needed to provide the best advice to the client or strategize regarding the next steps in the case.

STEP 2

Risk management

Understand the risks of maintaining the status quo and what resources will be required for adopting new technology.

Maintaining the status quo could mean being outpaced by the competition, client and talent attrition, low productivity, and unsustainable cost.

Adopting new technology will include workflow optimization, adoption cost and training, onboarding, and vendor management.

When building a risk profile, consider the value to cost of each risk, both in terms of culture, people, finance, and value.

STEP 3

Cost

Make sure you fully prospect the market for a cost model that fits your firm's requirements and won't shock you or your clients down the road with additional unforeseen costs of use and training.

DISCO uses a transparent, per-gig pricing model. There are no extra charges for processing data, the size of data as it expands following processing or running a production, built-in analytics, or for users, providing predictability — you pay for the data you load and the services you opt for, nothing more. Managed review services are available on a per-case basis. DISCO can be completely self-serve, or you can engage their professional services team to assist with day-to-day operations as needed.

STEP 4

Timeline and key milestones

Define the timeline for rollout and adoption with your stakeholders to ensure your schedule accommodates other existing priorities.

Once you have a timeframe in mind, work to understand what will need to happen in order to execute against it. Consider the people who'll need to be involved and the responsibility matrix you'll need to effect in order to ensure you set your firm up for success.

Work with your vendor to understand adoption and execution best practice and remember to build in flexibility for adaptation.

With DISCO, unlike many vendors, there is no software implementation delay or roll-out period. As soon as your agreement is signed, databases can be created and data uploaded to start reviews in hours instead of days.

STEP 5

Summary and evaluation

Repeat your objectives in unequivocal terms.

Explain why you're confident in your choice of DISCO as your vendor, and provide the materials in this guide or one of our solutions guides to help support your plan.

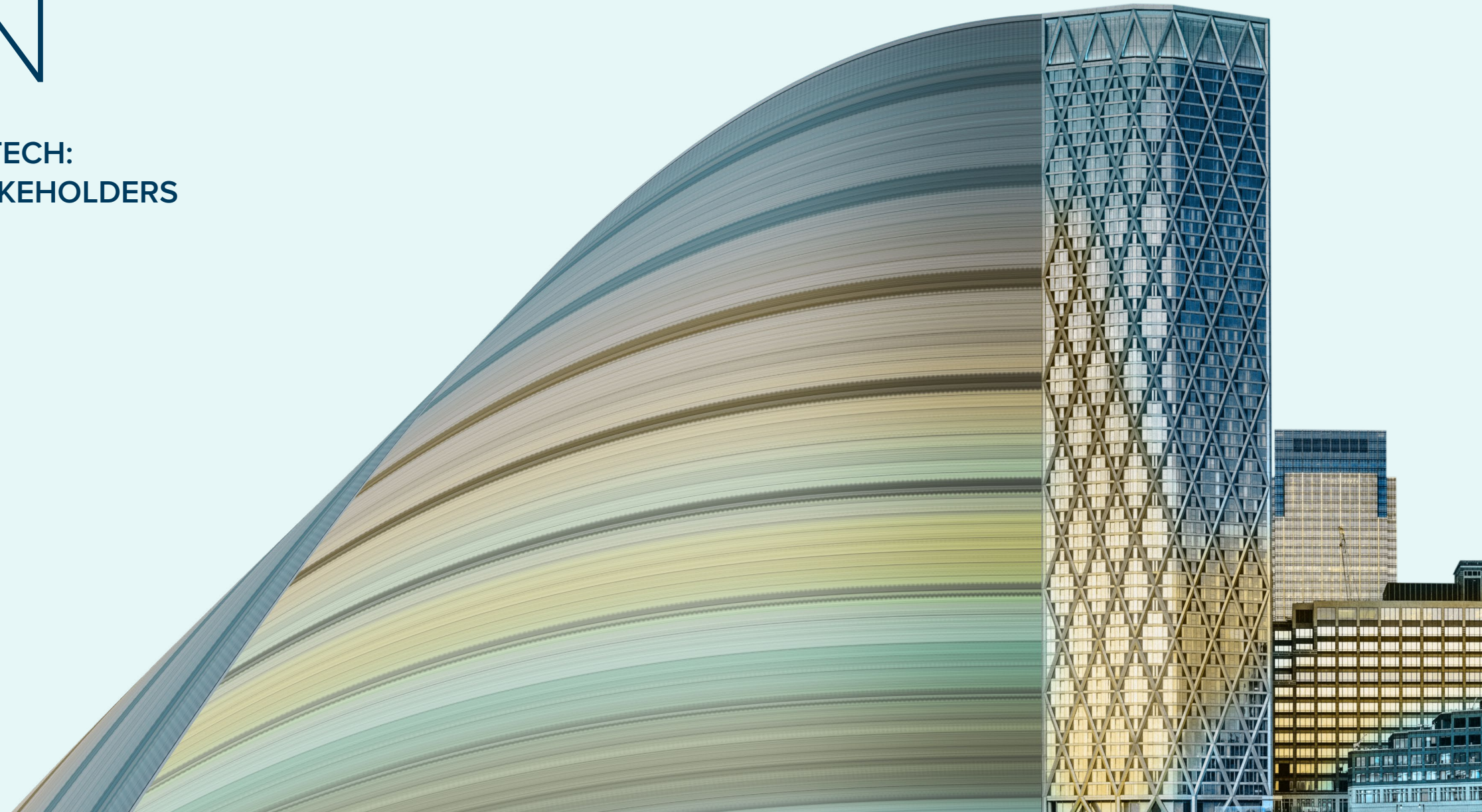
Remember to define how you'll evaluate success — consider post-adoption meetings with relevant stakeholders to measure the results against your goals.

Refer to our **Key Considerations Guide** to help you understand steps to undertake before building a project plan.

STAKEHOLDER BUY-IN

BUILD CONSENSUS FOR LEGAL TECH:
MAKE SUPPORTERS OUT OF STAKEHOLDERS

CHAPTER 3



Once you have created your project plan, it's time to identify your stakeholders: the people who will help (and potentially hinder) adoption. Use our matrix below to help understand the potential objections of stakeholders within the firm.

STAKEHOLDER MANAGEMENT:		HOW DISCO HELPS:
SENIOR PARTNERS	Recognise the pressures facing your managing partners by reinforcing and highlighting the outcomes of your strategy — how the technology will create a positive impact and materially improve the status quo. Be brief and concise and lean on your DISCO consultant to help provide statistics and data that lend credibility to your choice to partner with DISCO.	<ul style="list-style-type: none">• Total cost transparency for clients with flat-rate, per-gig pricing model.• 50%+ reduction of document review achievable with DISCO AI.• Improved client relationships from providing more value for their dollar.• Codified business expertise with cross-matter AI models.• Competitive edge with defensible AI workflows.
JUNIOR PARTNERS	These stakeholders will be keen to understand how DISCO will impact the day-to-day running of cases and case strategy. As with your managing partners, be brief and concise and, where possible, build in data points.	<ul style="list-style-type: none">• On average, our DISCO Review team is required to QC less than 5% of documents.• DISCO reviewers accept 4/5 AI recommendations and find 5/6 responsive documents using AI prioritized reviews.• DISCO Ediscovery can reduce errors and quality control costs with smarter technology.
ASSOCIATES	These stakeholders will want to know how the proposed technology will cut their workloads, help them meet deadlines, and how the technology will integrate with their day-to-day work. Help this group understand the practical effects of technology with examples and case studies. Ask their opinions and commit to ensuring their feedback is heard.	<ul style="list-style-type: none">• Say goodbye to the spinning wheel of death with subsecond search and document viewing speeds.• Eliminate complex and cumbersome reviews of spreadsheets with DISCO's enhanced viewer for Excel (you can even redact directly on the native with no extra plug-in required).• DISCO's auto scaling infrastructure is so powerful that over 80% of productions take less than 30 minutes to run in Ediscovery.• Case Builder enables you to copy and paste deposition testimony directly into your motions in your motions with the required citation formatting already applied in your motions with the required citation formatting already applied.

Cross-matter AI — never start your document review from scratch again

Cross-matter AI allows a user to leverage the learning accumulated from previous cases and carry it over into other matters. By applying cross-matter AI to previous cases, the same issues can be predicted in a new case. Similarly, privileged documents may be identified based on potentially privileged documents in past cases. Leveraging cross-matter AI can reduce hours and translate into significant monetary savings for the client and risk mitigation for your legal team.

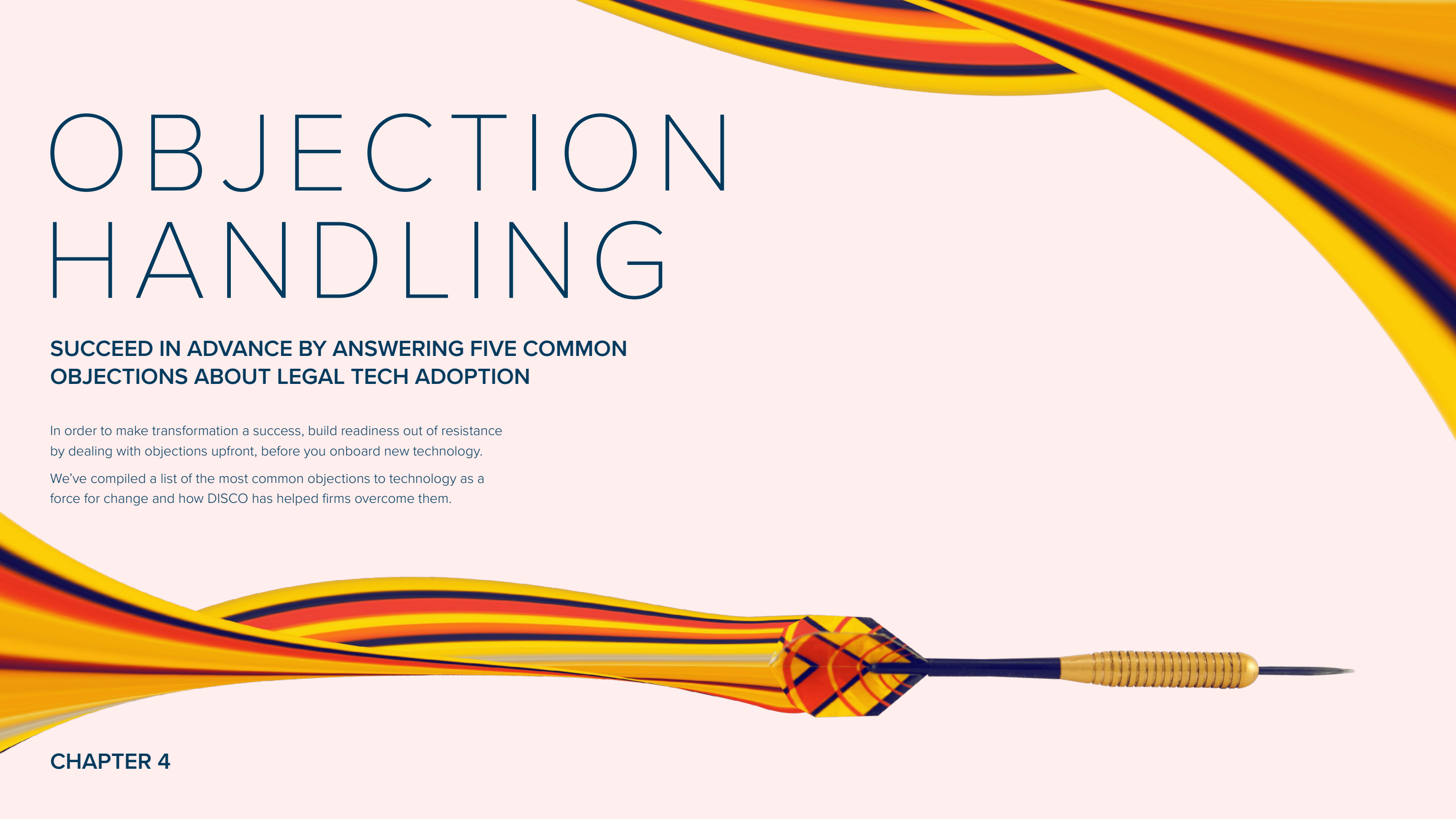
STAKEHOLDER MANAGEMENT:		HOW DISCO HELPS:
PARALEGALS	<p>This group of stakeholders can influence the use and adoption of technology. Provide regular updates and information about the project. Make sure they understand the rationale and impact before technology is adopted.</p>	<ul style="list-style-type: none"> • 89% of productions completed in under 30 minutes in DISCO Ediscovery. • 1.14 TB/hour max data upload throughput translating into max ingest of 27 TB/day. • Subsecond search and document viewing speeds. • Custom review stages that eliminate the need to manually create batches. • Eliminates the time-consuming, manual work required to load and sync depositions and associated videos, create trial designation lists, or prepare video evidence for presentation at trial with DISCO Case Builder.
KNOWLEDGE MANAGEMENT AND INNOVATION (KMI) OFFICERS	<p>With responsibility for identifying strategies, business opportunities, and new technologies, the KMI officer uses technology to deliver on those opportunities. They will want to understand how the proposed legal tech will accelerate their agenda – including better access to data and the digitisation of processes in order to drive collaboration, internal efficiencies, and a better client experience.</p>	<p>New business opportunities</p> <ul style="list-style-type: none"> • Leverage AI on individual cases to build and market out-of-the-box findings with firm-specific cross-matter AI models. • Create project-based pricing for managed review projects leveraging the speed and cost-certainty provided by DISCO Review’s guaranteed budget and timelines. • Build “assembly line” review processes that can be productized and sold to clients (as well as leveraged for your own firm). <p>Delight clients</p> <ul style="list-style-type: none"> • Improve transparency and case insights as with no user fees — corporate counsel can have access to your Ediscovery databases, built-in reporting, and key evidence with no cost impact. • Nurture long-lasting client relationships by using DISCO’s line of products to deliver client-centric results and value with reduced discovery costs. • Tackle internal data management processes. • Reduce institutional risk by developing defensible workflows when responding to lateral transfers, subject access request, client transfer request process, or other internal investigations and reviews within the firm. • Implement a platform that enables lawyers to easily, actually use deposition video.
IT STAFF	<p>IT departments will be keen to ensure a smooth transition from legacy systems and avoid creating complex “Frankenstacks” of technology. They will need to be assured of the provider’s data security, resilience, scalability, and the total cost of ownership, and to understand implementation/ deployment, training, and support options.</p>	<ul style="list-style-type: none"> • Data at rest is encrypted using AES-256 and in transit connections use the TLS 1.2 protocol. • Maintain client data securely by eliminating the requirement to send physical media to vendors to upload and process. With DISCO Ediscovery’s High-Speed Uploader, securely transfer 1.14 TB/hour max data upload throughput translating into max ingest of 27 TB/day. • Eliminate the time, cost, and expense of maintaining on-premises servers and managing software updates with DISCO’s cloud-native architecture.

OBJECTION HANDLING

SUCCEED IN ADVANCE BY ANSWERING FIVE COMMON OBJECTIONS ABOUT LEGAL TECH ADOPTION

In order to make transformation a success, build readiness out of resistance by dealing with objections upfront, before you onboard new technology.

We've compiled a list of the most common objections to technology as a force for change and how DISCO has helped firms overcome them.



1

“We already have a solution that works for us and that our teams use and like.”

The short, if combative answer, to this statement is, “Are you sure?”

Often, we accept the status quo because we’re simply too busy to consider the alternatives. When dealing with this objection, be prepared to talk about the pros and cons of the existing solution against those of DISCO.

“

We needed an AI tool that could learn the regulatory framework we were facing. We tried it with other providers, and we were unsuccessful. With DISCO, we not only found an AI solution that worked for us, but true partners who worked as an extension of our team.

Meredith Williams-Range,
Chief Knowledge and Client Value Officer,
Shearman & Sterling LLP

”

2

“DISCO isn’t materially different from any other ediscovery provider.”

Don’t allow a reductive approach to the market for technology to negatively limit your firm’s ambition. Deal with this objection by prospecting alternatives. Go beyond the conceptual pros and cons of different solutions and invite providers to present to you so you can interrogate their service provision. Talk to your objectors about the logic of shopping around — the familiar protocol we all follow in our daily lives before alighting on the perfect fit for our needs.

“

With DISCO, I can start reviewing my documents sooner. It’s not just the ingest and processing speeds — which are very fast — but that the product is so intuitive that I can do everything myself. I can receive data from my client and have it ready to review in 20 minutes.

Parisa Khademi, Partner,
Lewis Brisbois LLP

”

3

“We have a plan in place with agreed-upon budgets and we can’t deviate.”

This isn’t about deviation, it’s about evolution — tell your objectors that this isn’t about getting something wrong or undermining strategic goals, it’s about reinforcing the positivity of their innate flexibility and adaptability.

“

We had used various edisclosure platforms in the past, but having recently had an experience with DISCO on a smaller-scale matter, we knew that with DISCO we had several advantages, including speed, cost, and the strong capabilities of its technology-assisted review.

Steven Burkill, Partner,
Watson Farley & Williams LLP

”

4

“Ediscovery software won’t be able to handle the volume of data I need to work with in this case.”

Utilizing Amazon Web Services (AWS), DISCO automatically scales in real time based on your needs. No more waiting for servers, installing operating systems, and updating software while trying to work with hundreds of gigabytes of data. Utilising AWS, DISCO provides the same high-quality performance and security regardless of database size or complex file types.

5

“Our client won’t pay for this.”

DISCO uses a transparent per-gig pricing model. There are no extra charges for analytics or users, and clients enjoy cost-predictability. Managed review services are available on a per-case basis. DISCO can be completely self-serve, or you can engage their professional services team to assist with day-to-day operations per hour and as needed.

KMI Need-To-Know:

If your lawyers don’t understand how the AI methodology works and worry about defending it in court.

DISCO’s processes are transparent and therefore auditable, so if you were to be challenged on a matter of discovery, your firm will be able to defend how it arrived at its results. The DISCO team will support you in providing such evidence as you may need. Read how DISCO helped Withers LLP.

“

DISCO is intuitive and user-friendly, so once it’s up and running it helps the client forget about it. As lawyers, it helps us distil the vast volume of documents we need into a relevant dataset we can search.

”

Stephen Ross,
Partner and Head of Global Fraud Team,
Withers LLP

“

DISCO has created an intuitive solution that empowers our legal team to work faster and smarter to help our clients win.

”

Kate Charonko, Partner,
Bailey Glasser LLP

If you believe there will be objections other than those proposed above, please reach out to our experts to learn more about DISCO Ediscovery, Review, or Case Builder and our AI capabilities. We’re always glad to help.

SELECT A VENDOR

SUPPLEMENT YOUR SEARCH:
5 QUESTIONS EVERY FIRM SHOULD
ASK BEFORE BUYING LEGAL TECH

CHAPTER 5



Making a change to your mission-critical technology can be a huge risk. Moreover, the legal technology market is a crowded space with multiple providers vying for your dollar. During your search for a solution, make sure you ask:

1 Is the company credible?

Check peer review websites like TrustRadius and **G2** to see what other organisations in your position have said about the vendor and their technology.

2 Is the technology cloud-based?

Cloud-based solutions have become prevalent in every industry, including highly regulated ones such as healthcare, financial services, and insurance for the security, stability and security they can offer. DISCO uses a private cloud on AWS cloud infrastructure for on-demand storage and compute resources. This allows DISCO to offer a review platform that can automatically scale up resources in a secure and low-risk manner. Our native-cloud solution gives law firms, corporations, and government agencies total control over their edisclosure data, workflows, and costs.

3 Is the tech fast and easy-to-use?

Select a provider that supports collaboration and fast, intuitive access to data from different locations. Furthermore, look for providers, like DISCO, who are capable of uploading data cost-effectively and quickly from multiple locations.

4 Does the vendor offer adoption support?

Ensure you select a technology partner that places intuitive use at the core of its offering — that provides training and support in ways that delight case teams. Consider the benefits of access to academics like DISCO University that reward as they train.

5 Does the tech utilize cross-matter AI to future proof my processes?

AI-powered legal technology is not the tool of the future, it's the solution for today — great AI can help your firm get to outcomes even faster and free up case teams and staff to focus on substantive, billable legal work. However, you can go further with cross-matter AI — by leveraging institutional knowledge from other cases and productizing your expertise. Ask your vendor about cross-matter AI, and make it a fundamental component of your partner strategy. The firms that engage with this today will stand out for the efficiencies, reliability and scalability of service they will be able to provide.

WHY DISCO?

DISCO COMBINES WORLD-CLASS ENGINEERING
WITH A DEEP LOVE AND RESPECT FOR THE LAW
TO DELIVER THE BEST LEGAL TECHNOLOGY

Your all-in-one ediscovery solution.

Your worry-free solution to document review.

Your collaborative deposition
management and review platform.

Your systemized and efficient approach
to the legal hold process.

CHAPTER 6

CASE STUDIES

Law firms around the globe already trust DISCO to transform their workflows, processes and practices:

**Data driven counsel:
Yes, it can be done**

How to Build the Law Services Delivery Team of the Future — how Shearman & Sterling future-proofed the firm’s systems against the continuous change of data regulations.

**DISCO AI reduces
review population by 60%**

How a large electrical contractor used DISCO AI to reduce a document review population alongside pressure from regulators to produce responsive documents.

**24 TBs with 120 users? DISCO
delivers with no loss of speed,
performance, or accuracy**

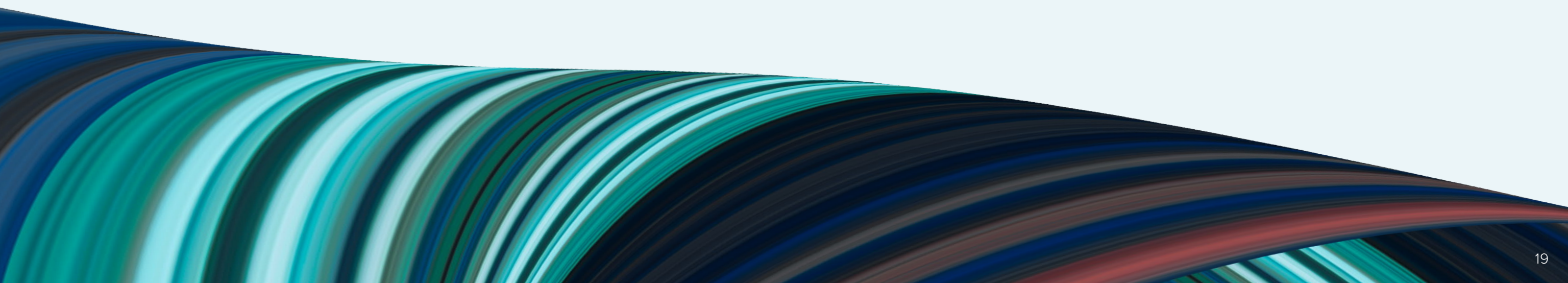
How a litigation boutique ingested and reviewed 24 TBs worth of productions from the opposing party with no loss of speed, performance or accuracy.

**8 million docs, 90+ reviewers,
1 manager – no problem**

How a litigation boutique was able to utilize DISCO project managers, fulfillment partners and Ediscovery to onboard, manage, and complete an efficient review with more than 90 contract reviewers.

**A 1.4 million document
production in just 2 weeks**

How a global law firm was able harness the power of DISCO’s AI, just-in-time batching, and AI-optimized workflow, to meet a tight production deadline.





ABOUT DISCO AI

DISCO believes in making AI that works for everyone – and makes everyone's working lives better. Familiarize yourself with this free, built-in component of our solution that will take your next matter to the next level:

UNDERSTAND OUR AI

Infuse your processes with advanced machine learning.

EXPERIENCE DISCO

Give your presentation more real-world clout.