



Litigation Readiness Self Assessment Report Card

(place a 2 next to items you are doing very well, place a 1 next to items you are sometimes doing or in the process of doing, place a 0 next to items you are not doing)

Information Governance

- ___ Regularly Update and Revise IG Policies
- ___ Have A Cross-Functional Team
- ___ Automated Retention/Disposition
- ___ Have Company Collaboration Tools
- ___ Email Management Strategy
- ___ Conduct Training Sessions
- ___ **Score**

Data Security

- ___ Cross-Functional Committee
- ___ Education
- ___ Third-Party Risk Management Vetting
- ___ Cyber/Incident Response Preparedness
- ___ **Score**

Preservation

- ___ Automated Processes
- ___ System/IT Holds
- ___ Preserve Data in Place
- ___ Compliance Metrics & Reporting
- ___ Release Checklist at Matter Close
- ___ Enterprise Training
- ___ **Score**

Collection

- ___ Standard Collection Processes & Documentation
- ___ Enterprise Collection Tools
- ___ Custodian Interviews
- ___ Workflow Tracking & Audit
- ___ Search Term Agreement
- ___ Plan for Newer Data Sources
- ___ **Score**

Document Review

- ___ Review Guidelines
- ___ Standard Review Setup
- ___ Defined Managed Review Threshold
- ___ Analytics Driven Review Method
- ___ Outside Counsel Involvement
- ___ **Score**

Emerging Data

- ___ Focus on Emerging Data Sources
- ___ Policies Governing New Sources
- ___ Chief Data Officer
- ___ Company Sponsored Applications
- ___ Established Agreements with Partners
- ___ **Score**

Outside Counsel Management

- ___ Standard Guidelines for Outside Counsel
- ___ Rate Benchmarking
- ___ Preferred Providers with Favorable Rates
- ___ Law Firm Satisfaction Survey
- ___ OC Summit
- ___ **Score**

Team Structure, Roles & Growth

- ___ Clear Team/Role Definition
- ___ Appropriate Level of Cross-Training
- ___ Internal Hub Driving Process
- ___ Strong Alignment with Counsel
- ___ IT & Legal Partnership
- ___ Career Path/Opportunities
- ___ **Score**

Report Card Total: _____