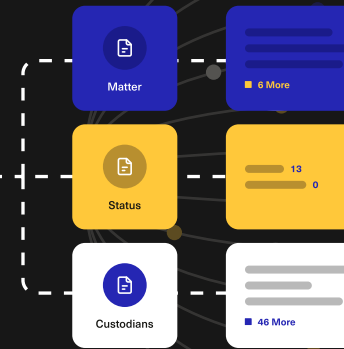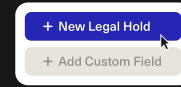# Casepoint Legal Hold

Seamlessly Preserve Critical Data with Ease

Corporate litigators understand better than anyone — legal holds need to be issued swiftly and accurately to ensure defensibility and mitigate risk. When you're under a duty to preserve, it's critical to act quickly and diligently to ensure no potentially relevant information is destroyed.

That's challenging when you're issuing legal holds using manual, ad hoc processes vulnerable to human error. It can also be a challenge if you are using clunky, overly complex, or legacy legal hold technology. Factor in the explosion of data from cloud-based applications such as Slack and MS Teams — which now account for a sizable portion of ESI — and the challenge becomes even bigger.

◗ The Solution to Simplifying Legal Holds

Casepoint Legal Hold transforms slow, manual processes into streamlined workflows across roles and departments. Our powerful API directly connects to Microsoft 365, Teams, Slack, Google Vault, Box, Dropbox, and other cloud data sources.

Automate & Collect with Ease

Easily configure custodian management to automate users' notifications with customizable templates. Streamline the data movement process by sending collected data directly to a workspace for processing and promotion to review.

Save Time & Stay Organized

View and manage all legal hold activity by using the Custodian Portal. Track responses and keep everything organized in one secure solution.

Ensure Defensibility

Protect sensitive data and reduce risk with direct collection of documents and data, without the need for usernames or passwords. Our disruption-free, scalable, and defensible collection technology is powerful, simple, and secure.

◗ Ditch the Spreadsheets – There's a Better Way

Casepoint Legal Hold will help you reduce time, cost, and risk associated with the legal hold process. You'll be able to implement legal holds and prepare data for review with ease, all from one secure platform. That means:

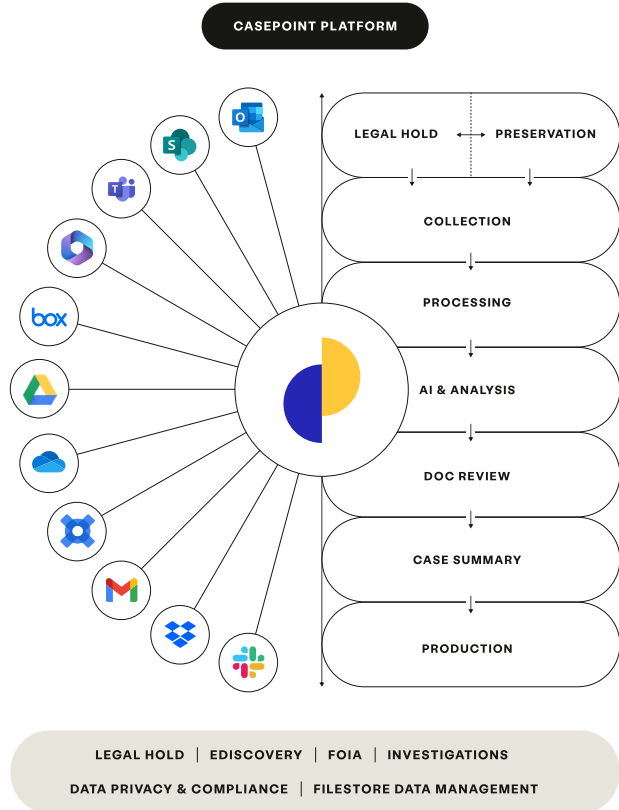| No more logging in and out of other applications	No more manually transferring files	No more ad hoc emails	AND NO MORE SPREADSHEETS

Casepoint Legal Hold Features & Benefits

- Create and manage all details throughout the entire lifecycle of legal holds in one place.
- Connect and sync custodians directly from your own user management system.
- Integrate with your own email server so legal hold communications are sent from your own domain.
- Design custom communication templates using smart fields for repeated use across multiple holds.
- Automatically alert internal departments such as IT, HR, or GC when hold notices are sent to custodians.
- Utilize expanded configuration options for fields, views, templates, and more.
- Set up automatic reminder notifications to ensure hold acknowledgment and response.
- Build a question bank to easily create custom questionnaires and templatize standard forms.
- Automatically collect and collate custodian responses to questionnaires within the platform.
- Add attachments to custodians on hold to include information gathered outside the system.
- Leverage the Custodian Portal, a secure communication portal where custodians acknowledge participation in a hold, view all active holds they're associated with, answer questionnaires, and respond to outstanding tasks.
- Trigger preservation and collection of cloud data within the legal hold tool itself.

CASEPOINT PLATFORM

LEGAL HOLD ← → PRESERVATION

COLLECTION

PROCESSING

AI & ANALYSIS

DOC REVIEW

CASE SUMMARY

PRODUCTION

LEGAL HOLD | EDISCOVERY | FOIA | INVESTIGATIONS
DATA PRIVACY & COMPLIANCE | FILESTORE DATA MANAGEMENT

That's not all — once data has been collected and preserved, you can streamline the data movement process and leverage **Casepoint eDiscovery** to process, analyze, and review your data.

Whether you're looking to eliminate spreadsheets, upgrade your current legal hold solution, or start using a secure end-to-end solution for your internal investigations and litigation needs — choose Casepoint. It's the best tool for the job.

Contact Us