

ADOPTED EDEN Standard No. 2

INFORMED PROJECT SCOPE AND COST GUIDANCE

At the outset of any engagement, EDEN members should provide clients with informed project guidance and reasonably accurate cost estimates.

Please submit comments, suggestions, and inquiries to: standards@edenhub.com.

COMMENTARY

A professional community of electronic data extractors in support of litigation must strive at the outset of any project to provide clients with informed project guidance based on experience and the practical realities of the project. This includes providing reasonably accurate cost estimates based on the information available at the time the engagement is undertaken.

As experienced electronic data extractors, EDEN members have practical knowledge and technical know-how that can assist their clients in identifying issues and solutions that may not be obvious to the lay person. By taking proactive steps to gather the information that is a necessary prerequisite to informed project guidance and cost estimates, EDEN members will help to ensure that they are providing clients with the most efficient and cost effective services for their needs.

An associated benefit of this Standard to EDEN members is protection from client misunderstandings and frustration. More in depth information gathering at the start of a project will lead to less misunderstanding and more accurate cost estimates. Of course, despite such best efforts final invoice totals will inevitably exceed estimates at times for a broad range of reasons. From a customer relations standpoint, the ability to review project intake documentation regarding scope of work and cost estimates can be extremely helpful in explaining cost overruns and limiting client frustration and dissatisfaction.

Comporting with EDEN Standard No. 2 does not mean that an EDEN member should substitute its judgment for its client's. What the Standard concerns is EDEN members' structured ability and attempt to provide informed guidance. As the ultimate decision-maker, clients are free to dictate courses of action or choose strategies that may not be recommended as the most efficient or cost effective.

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PROCESS SUPPORTING STANDARD

Establishing a thorough project intake procedure is necessary to the timely and efficient performance of the information gathering that is critical to achieving informed project guidance and accurate cost estimation.

As data extraction projects can involve an almost unlimited number of possible technical configurations and specifications, EDEN recommends the use of intake checklists and similar forms in the intake process. Used properly, and reviewed and updated regularly to account for experience, revised service offerings, and technological advances, such forms can help to ensure that the important issues involved in a data extraction project are introduced to clients at the outset of a project.

A model Hard Drive Data Capture Project Intake Checklist supporting Proposed EDEN Standard No. 2 is available to EDEN members for review and comment in the member portal at: <http://edenhub.com/resourcesMem.html>. Similar forms can be created for every facet of the electronic discovery process.

No project intake process can be complete without a reasonable effort at cost estimation. The balance of costs versus benefits is of crucial importance in the e-discovery process and, from a practical standpoint, in the crowded e-discovery industry accurate cost estimation can mean the difference between client frustration and satisfaction.

A model Project Cost Estimation Worksheet supporting Proposed EDEN Standard No. 2 is available to EDEN members for review and comment in the member portal at: <http://edenhub.com/resourcesMem.html>.

Copies of both of these forms should be completed by a project intake specialist and should be provided to clients for their reference and education as well as preserved in internal files for future reference.



EDEN members are a diverse group, and although EDEN makes every effort to develop model forms that are useful in a broad range of contexts, members are reminded that the EDEN forms are examples intended for a broad audience that should be tailored as necessary to individual needs and practices.

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