



# LEGAL HOLD MIGRATION

We manage your entire data migration, completely and accurately—the first time.



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The migration of legal hold information from legacy system(s) can seem like an overwhelming and daunting challenge. What data should be migrated into the new system? How will the data be migrated? How can I ensure that the data is migrated correctly?

We can help.

Our team of professionals has proven experience helping organizations compile, evaluate and remediate legal hold data with a focus on designing and executing a migration plan to optimize the way you view, track and manage legacy hold notifications. We have experience with industry leading platforms and specialize in auditing the legal hold migration process from start to finish to ensure all data is accurate and complete.

## WHY CONSILIO?



Team of experts certified on all the leading applications



Over 40 legal hold implementations completed



Proven migration methodology, best practices and quality control processes



Deep experience with high-volume, complex and multisystem migrations

## PROVEN SUCCESS

Consilio's experts have a track record of successfully partnering with clients to overcome their legal hold migration challenges. Among our engagements:

Migrated **500 legal holds** across **30,000 custodians** from two different legacy legal hold systems for a Fortune 50 healthcare company.

Performed a **data migration audit** post system-go-live and **reconciled custodial data** with the HR feed for a Fortune 50 pharmaceutical company.

Developed custom **step-by-step guidelines** and **legal hold migration plan** for an investment services company.

Migrated **60 matters** across **10,000 custodians** from a SharePoint site for a Fortune 50 software company.



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## OUR APPROACH

Leverage our expertise and deep industry knowledge to manage your legal hold migration process. We work as an extension of your team and can partner with you to lead the migration, from planning through post-migration support, or just handle specific tasks. Our experts will:

### PLAN

- Set timeframes and determine roles and responsibilities
- Assess current legal hold data and provide strategic guidance for your custom migration plan, including the types of data to migrate
- Advise on best practices for future-state legal hold process decisions

### EXECUTE

- Extract data from existing legal hold systems
- Migrate a data slice to reduce potential errors and ensure parties are aligned
- Execute your organization's unique data migration plan
- Conduct regular quality control tests to assure accuracy

### AUDIT

- Partner with vendor to document and resolve errors
- Review data in the system post-launch for completion and accuracy
- Ensure the system is functioning as expected and any automated communications are being sent at their prescribed times

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## OUR TEAM

The Consilio team is committed to providing a customized, efficient and accurate legal hold migration solution for every client. With more than a decade of experience assessing and improving discovery programs, our experts adopt a holistic, proven approach to legal hold migration that considers your organization's unique technologies, existing process flow and organizational structure. We emphasize upfront planning and will partner with you to make strategic migration decisions. Our technical expertise, willingness to liaise directly with legal hold vendors and quality control checks ensure that all of your information is migrated accurately and efficiently the first time. Consilio is dedicated to providing the best end-to-end legal hold migration experience no matter your industry, legal hold system or current legal hold portfolio.

*Contact us at [info@consilio.com](mailto:info@consilio.com) to learn how we can deliver seamless migration for your legal hold rollout.*