



ORGANIZATION OF LEGAL PROFESSIONALS

OLP eDiscovery
Project
Management
Certificate
Program



Program Overview

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E-Discovery Project Management Certificate Program

Organization of Legal Professionals' (OLP) eDiscovery Project Management Certificate Program is an eight course (with one optional elective) , five month series focused on the creation of an effective project leader beginning with their first eDiscovery assignment. Courses focus on the practical application of legal, IT and project management skills and real world scenarios in an interactive, web based, live simulation environment.

Program Highlights

Designed, developed and delivered by preeminent experts, consultants, law professors, senior paralegals, paralegal managers and other leading industry professionals, OLP's online, live and interactive eDiscovery Program instructs legal professionals specifically in the areas they are most likely to be assigned. After completion, all students may audit any courses offered by OLP of their choosing at any time. The program is an excellent educational tool to sit for the eDiscovery Certification Exam (CeDP) offered by OLP. Taking this course does not give students automatic certification. You must take and pass the CeDP exam in order to be certified.

Legal Professionals face a unique challenge today. The evolving field of eDiscovery demands a different approach to adult learning. Using student-centric learning technologies delivered through real-time, OLP's eDiscovery and other courses assists students in learning faster and retaining more. With live, online lectures and labs, students are able to see, hear and interact with instructors and other students. They participate in collaborative learning, view multimedia presentations of course content and engage in ongoing forum discussions. Students are given real-world cases to receive hands-on experience in a supportive environment.

OLP's interactive, cutting-edge courses will cover:

- Analysis of relevant eDiscovery case law with a focus on the EDRM, preservation, collection, analysis, review, production, cost controls and early case assessment of electronically stored information (ESI).
- A comprehensive study of IT systems including common system architecture and data storage protocols and its relationship to eDiscovery.
- Practical instruction on project and case management assignments you are most likely to be assigned.
- Course meets once per week. On certain occasions, it may meet twice per week for 90 minutes – two hours each session for 5 months.

Summary: eDiscovery Courses of Study

1. Fundamentals of eDiscovery

ED501

Three sessions – 2 hours each session

This course is the best option for experienced legal professionals to increase their knowledge about e-Discovery. The course covers the core competencies of eDiscovery including the "EDRM (edrm.net)" case law and practical application. Taught by seasoned pros, this no nonsense intensive course teaches students the latest in e-Discovery issues.

2. Advanced eDiscovery

ED502

Three sessions – 2 hours each session

This course is presented by a team of expert faculty specializing in e-Discovery with practical examples, case studies and practice. Students will take a deep dive into specific advanced eDiscovery topics. Students will learn how key components of e-Discovery must be integrated and aligned to achieve success. One session is devoted to forensics and its piece in the eDiscovery world.

3. Legal Project Management

ED503

Three sessions – 2 hours each session

Through these sessions, students will be introduced to a project management approach, body of knowledge standards, how to define scope, manage resources, use of estimating techniques, good communications planning, managing change and risks, enabling good team dynamics, and even suggested project closure procedures for the legal professional.

4. eDiscovery Project Management

ED504

Two Sessions – 2 hours each session

Successful eDiscovery project management identifies issues sooner and has consistent methods which minimize the risk and exposure impact to the overall success of the project. This two-part series is designed to combine proven-by-practice methods with new insights and ideas from a wide range of resources. Students learn how to smoothly facilitate eDiscovery management and walk away with the knowledge to ensure successful management of eDiscovery matters.

5. The "EDRM (edrm.net)" Phases – A Detailed Course (Two Parts) **ED505**

- a) Collection, Process and Analysis -
Part I Four sessions – 90 minutes each session
- b) Review and Production
Part II Four sessions – 90 minutes each session

This two-part "EDRM (edrm.net)" course concentrates strictly on the phases of the "EDRM (edrm.net)". The course can be added to Fundamentals of eDiscovery and Advanced eDiscovery or in lieu thereof. The difference in the two courses lies in Fundamentals and Advanced eDiscovery having a wider degree of topics discussed as opposed to Phases of "EDRM (edrm.net)" that concentrates on each individual phase with fewer overall topics. These classes are also a good supplement to Fundamentals and Advanced eDiscovery.

6. Design and Implementation of eDiscovery Cost Controls **ED506**

Two sessions – 2 hours each session

This course gives students the tools to achieve clarity that balances real-life decision making and rational analysis. Attendees will come away with a battery of new techniques to step back and examine projects before making costly mistakes. We cover challenges when dealing with record retention policies, custodian interviews, data sources and preservation. Students will be able to align outcomes to smart, timely and effective decision making.

7. International e-Discovery, e-Disclosure and Information **ED507**

Governance

Two sessions – 2 hours each session

No consistent methodology exists for United States courts to evaluate whether discovery of ESI abroad is appropriate, and if so, the consequences for not complying with a discovery order. United States courts need to apply a consistent standard to decisions involving the discovery of international ESI. This course reviews existing law related to international discovery and eDiscovery along with a blended approach to evaluate ESI.

8. Case Management Lab **ED508**

Three sessions – 2 hours each session

Following the completion of the eDiscovery Project Management Program, students may choose to participate in a real-life scenario within an eDiscovery case. This course extends the student's knowledge of the framework, models and practices for managing a real-life case. This hands-on workshop will allow students to make decisions, coordinate workflow and carry-out real-life assignments in a group setting.

9. Elective (Optional) Software Review Lab ED509

Three sessions – 2 hours each session

Demonstrations and workshops set up throughout the course that will provide overviews of some of the leading collection and review tools in the eDiscovery market.

Learning Objectives

Upon completion of this program, graduates will be able to:

- Demonstrate knowledge of the e-Discovery process, fundamental legal principles, and the EDRM model;
- Demonstrate problem-solving and critical, analytical thinking skills within the context of evaluating e-Discovery practical issues;
- Communicate effectively with accurate legal terminology in written and/or oral form, with a demonstrated proficiency in the use of technology.
- Demonstrate knowledge of the principles of e-Discovery legal ethics and Best Practices
- Proficiently access, locate, and manage e-Discovery cases.

Prerequisite to the Program

The OLP eDiscovery Project Management Certificate Program is geared towards attorneys, litigation support professionals, paralegals, case managers, consultants, legal support providers, outsourcing organizations and other legal professionals.

To qualify, students must have at least one year experience in a law firm, in-house legal department or legal support provider. OLP recognizes that many law firm professionals have “come up through the ranks” with on-the-job training and therefore, we waived mandatory requirements for a four-year degree or certificate.

Completion of the Program

To earn a Certificate of Completion to the Program, students must complete all courses ED501 - 508 satisfactorily within 18 months of start date. A Certificate of Completion is not an academic credential. There are no state course or grade requirements necessary. Students must meet admission requirements, attend all classes and receive satisfactory grades to receive the Certificate.

Tuition

Program tuition:	3900.00 OR
OLP Member Discount	3600.00
Estimate for books & materials	125.00

Payment options:

Payment in full prior to start date	3900.00
Payments over 5 months	4150.00

Please note: No refunds. Students may provide a substitute or apply credit towards another course . Once a student enters a payment plan, students agree to pay all tuition amounts due before the end of the course whether or not they complete the program.

Detailed Course Outlines

1. Fundamentals of eDiscovery

Three Sessions – Two hours each session

This course is the best option for experienced legal professionals new to eDiscovery or with intermediate eDiscovery knowledge to increase their knowledge about eDiscovery. You will be able to see and speak with the instructor and other students via webcam. Taught by seasoned pros, this no nonsense intensive course teaches students the latest in e-Discovery issues. This course is for attorneys, paralegals and litigation support professionals – anyone working in eDiscovery.

Examples of What You Will Learn

- What is eDiscovery?
- "EDRM (edrm.net)" Model basics
- Collection, Processing, Review and Production
- Federal Civil Procedure Rules
- Risk Management Issues
- Sanctions & Duty to Preserve
- New Tools and Technology
- Document Retention Policies
- Regulatory Compliance
- Post-Litigation Response
- The Changing Face of Litigation
- Governing Law
- Sedona Principles
- Ethics and eDiscovery
- Driving Costs of Litigation

2. Advanced eDiscovery

Three Sessions – 2 hours each session

This course is presented by expert faculty specializing in e-Discovery with practical examples, case studies and practice. You will learn how key components of e-Discovery must be integrated and aligned to achieve success. Through this course you will discover how all components of e-Discovery fits together and gain insights into e-Discovery its impact on your case. You will be able to develop a strategy and establish a sustainable competitive position and develop an effective trial team successfully manage people.

Some Example of What You Will Learn

- Basics of International eDiscovery
- Litigation Holds & Notices
- Conflict Between the Circuits Regarding the Standards for Imposing e-Discovery Sanctions
- How to Avoid or Mitigate Sanctions
- Admissibility of Electronic Evidence
- All About Metadata
- Plaintiff's v. Defendant's Goals in Document Review
- Early Case Assessment (ECA) & Quantifying the ECA Investment
- Maximizing Value by Employing Advanced Technologies
 - E-Mail Threading
 - E-Mail Analytics
 - Automated Workflow and Categorizations
 - Predictive and Semantic Coding
- The Importance of People and Processes to Optimize the Effectiveness of Technology
- Inaccessible/Accessible ESI
- Forensic Collections and Analysis

3. Legal Project Management

Three sessions - Two hours each session

The role of project management in the business industry is a well adopted best practice to help improve strategic and tactical objective deliverables. According to many business leaders, project management improves the ability to plan, implement, and manage activities to accomplish specific organizational objectives. So why isn't project management a clear defined role in the legal industry? Adopting project management techniques can be a very helpful approach for paralegals, attorneys, and managing partners who learn the need to deliver quality legal services within limited budgets.

Legal professionals such as paralegals, attorneys, and managing partners should be seeking alternative methods to deliver quality services and best practices to practice management and clients, to improve the client and business partner's experience through proper execution of project management techniques, tools, and methodologies.

Through these sessions, you will be introduced to a project management approach, body of knowledge standards, how to define scope, manage resources, use of estimating techniques, good communications planning, managing change and risks, enabling good team dynamics, and even suggested project closure procedures for the legal professional.

What You Will Learn:

- What is Project Management and why should the firm/company consider it?
- An overview of project management and how it relates to the legal field.
- Considerations when accepting requirements for projects and when cost, time, quality, and risks are key success factors to meeting the clients and firm's needs.
- Understanding the challenges that are encountered when firms take on new case matter, organizational needs and changes, technology considerations, and how project management can support with the overall strategy.
- Approaching decisions to framework Project Management and the value-add it offers.
- Who are the key stakeholders in project management, and how will the project role fit in the firm's already business schedule?
- How can non-project managers be successful with project planning?
- How will the approach of initiating, planning, executing, monitoring and controlling, and closing the project be managed?
- Watchful steps for identifying other critical success factors to monitor the project's success.
- How will challenges such as Risks and Opportunities be viewed, and managed, throughout the project?
- Examples of project management information systems, and how a defined communications plan will be critical to the entire firm.
- Project integration management of risk, quality, and the human relationship factors of managing the plan.
- Monitoring and controlling project cost and tracking performance.
- What are the best practices to prepare to wrap up and close your project?
- What will the project's lessons learned say about the success, or failure, of a project?
- What additional checks and balances are needed to properly close the project?

4. EDiscovery Project Management

Two sessions - Two hours each session

eDiscovery challenges today demand a lot more than "good enough." When outstanding results are expected - or necessary - it isn't enough to just be effective. The stakes are high. Your entire case could depend upon the decisions that you make. The most effective eDiscovery Project Managers use powerful tools and techniques, exercise greater influence, solve bigger problems and drive unprecedented performance results.

Successful eDiscovery project management identifies issues sooner and has consistent methods which minimize the risk and exposure impact to the overall success of the project. This two-part series is designed to combine proven-by-practice methods with new insights and ideas from a wide range of resources. Learn how to smoothly facilitate eDiscovery management and walk away with the knowledge you need to ensure successful management of your firm's eDiscovery matters.

What You Will Learn:

- Understand what methods and new techniques work most effectively in eDiscovery Project Management
- Learn key concepts used by top experts
- Find out how project management moves from concept through implementation to realization
- Identify specific ways you can manage your project utilizing best practices

5. The Phases of "EDRM (edrm.net)" – A Detailed Course

The following two "EDRM (edrm.net)" courses concentrate strictly on the phases of the "EDRM (edrm.net)": 1) Collection, Processing, and Analysis; 2) Review and Production.

A. **Collection, Processing and Analysis** 4 sessions 90 minutes each session

What You Will Learn:

- Students will have an understanding of the day-to-day encounters with eDiscovery and how to take a practical and legally defensible approach to solving the common problems.
- Students will learn to identify and collect data from critical data sources
- Students will learn Early Case Assessment to avoid prohibitive costs and initiate risk management
- Cost Considerations
 - Estimating & Budgeting
 - Tool/Vendor Vetting and Considerations
 - Choose Appropriate Pricing Method (GB, #docs, etc.)
 - Cost Sharing Agreements/Requirements
 - Who pays What?
 - Justification and Objections to Cost

B. REVIEW AND PRODUCTION

4 sessions 90 minutes each session

What You Will Learn:

- Students will have an understanding of what it means to review documents in the context of litigation along with case law and relevant literature on the subject.
- Students will be able to clearly define the objectives of the review along with the strategy, timelines, workflow and procedures, and creating effective document review criteria.
- Students will be able to use data analytics tools to help identify patterns in data, apply concept grouping, and effectively use keyword search technology to move the review forward.
- Students will be able to speak intelligently about computer assisted review and whether its use is appropriate in a particular project.
- Students will be able to understand production deliverables including output options, formatting, privilege considerations, and how to avoid inadvertent disclosure.
- Students will be able to set up a privilege review and create privilege logs when necessary.

6. Design and Implementation of eDiscovery Cost Controls

Two sessions – 90 minutes each session

This course gives students the tools to achieve clarity that balances real-life decision making and rational analysis. Students will come away with a battery of new techniques to step back and examine their projects before making costly mistakes. We cover challenges when dealing with record retention policies, custodian interviews, data sources and preservation. Students will be able to align outcomes to smart, timely and effective decision making.

Benefits of Attending

- Be more decisive, eliminating uncertainty when making risky decisions
- Learn a structured process for ultimate enforcement and compliance
- Effectively analyze, articulate and draw conclusions regarding your project with clarity
- Explore real-world examples of cost control and risk management

Topics Covered

- Record Retention Policies 101
- Enforcement & Compliance
- Auditing & Defending
- Dealing with BYOD, Social Media, Cloud, and more
- Knowing Your Data Sources
- Custodian Interviews
- Dealing with Policy Violating Sources
- Negotiating Data Sources
- Meet & Confer Conferences, Cooperation Proclamation
- Broad Preservation...Strategic Processing
- Collect Then Target
- Proving the ROI
- Factors on The Approach

7. International e-Discovery, e-Disclosure and Information Governance

Two sessions –90 minutes each session

No consistent methodology exists for United States courts to evaluate whether discovery of ESI abroad is appropriate, and if so, the consequences for not complying with a discovery order. eDiscovery professionals must be equipped with the appropriate knowledge when faced with international discovery. This course reviews existing law related to international discovery and eDiscovery along with some of the common pitfalls when evaluating international ESI.

What You Will Learn:

- Risk Assessment and Gap Analysis for local and international data transfer procedures as they are affected by privacy and data protection laws;
- Preparation of protocols for international data transfer needs;
- Risk assessment and Gap Analysis for readiness to transfer data to the U.S. for compliance with data demands in regulatory proceedings and litigation;
- Preparation of Notices, Consents and other documents with regard to transfer of data;
- What registration with the U.S. Safe Harbor Program means;
- Binding Corporate Rules and data transfer, including those utilizing E.U. Model Clauses;
- Appearances at U.S. discovery conferences and other proceedings to assist in tailoring U.S. discovery orders to the data transfer restrictions of non-U.S. jurisdictions.

8. Case Management Lab

Three sessions – 2 hours each session

Following the completion of the eDiscovery Project Management Certificate Program, students participate in a real-life scenario within an eDiscovery case. This course extends the student's knowledge of the framework, models and practices for managing a real-life case. This hands-on workshop will allow students to make decisions, coordinate workflow and carry-out real-life assignments in a group setting. Prerequisite: Successful completion of all eDiscovery Project Management Certificate Program courses.

9. Software Review Lab Optional Elective

Three sessions – 2 hours each session spread throughout the course

Demonstrations and workshops set up throughout the course that will provide overviews of some of the leading collection and review tools in the eDiscovery market.



For more information including start dates and group rates, please call or email

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