WHY MIGRATING YOUR DATA IS LIKE MOVING TO A NEW HOME

If you've ever had the experience of moving from your apartment, studio, flat, condo, townhome, or house, you know how painstaking and awful it can be. There's an entire checklist of things that absolutely must go right, including selecting the right moving company.

That's where the rubber hits the road. Failing to choose the right moving vendor could be the end of your Great Grandma Edith's fine dining dishes. If you are stressed just reading this, it's because you've been there! But now you must be asking – what does this have to do with e-discovery? Everything!

Migrating from a legacy e-discovery vendor to another provider such as a professional services and consulting firm is a big deal for any organization. In all likelihood, there's a treasure trove of information that has not been placed into cold storage, has not been archived, and has not been removed. The data has been sitting there collecting dust, just like Great Grandma Edith's collectibles. The difference is that your organization has been paying for that data every month. The larger the volume, the harder it is to inventory what's "sitting there"– especially when the legacy vendor is not proactive in providing weekly storage reports and advocating a data management strategy.

The result? Costs pile up as your organization accumulates a mountain of data and the legacy vendor keeps making money.

If your organization has finally made the decision to migrate your data, perhaps it is because your new e-discovery vendor:

▶ Is building out a dedicated managed service environment for centralization, cost containment and a vastly stronger data security posture;

▶ Has professional services that are proactive in case strategy, cost recovery and data management— and serve as an extension of your team; and/or

▶ Provides data transparency in reporting with innovative dashboards.

Whatever your reasons, the question becomes: how do you migrate successfully?

Similar to moving out of your home, there's a lot that must go right, but none of these things should dissuade you from moving forward. Here are five key considerations when migrating your data.

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1. PRESIDENT EISENHOWER WAS RIGHT

Great Grandma Edith's heyday was in the 1950s when Dwight D. Eisenhower was president, and he was well organized. President Eisenhower created the Eisenhower Matrix, a productivity approach to handling the toughest job in the world. He broke down every task into four quadrants: highly urgent and highly important, which meant he needed to get it done; highly urgent but not important, which meant he was likely going to delegate the task to someone else; highly important but not urgent, which meant he'd defer the task to another day; and not important and not urgent, which meant he was going to delete it. You should apply the same strategy to your data migration:

- ▶ Highly active matters—those currently being litigated—are urgent and important and must be ported over first.

- ▶ Matters that have been dormant for a few months are urgent, but not important to move over first. This data might benefit from sitting in a RelativityOne Repository storage, as it'll be easier to spin back up into the Review database.

- ▶ Matters that have been dormant for longer than six to nine months might be important, but not urgent, and therefore may be placed in RelativityOne Cold storage.

- ▶ Finally, if the matter has been dormant for longer than a year, it's neither urgent nor important – but it is important to decide whether this data will be archived and placed in RelativityOne Staging or archived in Cold Storage.

- ▶ Mapping out every matter in this four-quadrant approach sets everything else up for success downstream.

The Eisenhower Box with Daily Activities

	URGENT	NOT URGENT
IMPORTANT	**DO** *Do it now.* Write article for today.	**DECIDE** *Schedule a time to do it.* Exercise. Calling family and friends. Researching articles. Long-term biz strategy.
NOT IMPORTANT	**DELEGATE** *Who can do it for you?* Scheduling interviews. Booking flights. Approving comments. Answering certain emails. Sharing articles.	**DELETE** *Eliminate it.* Watching television. Checking social media. Sorting through junk mail.

> *What is important is seldom urgent and what is urgent is seldom important.*
>
> **-Dwight Eisenhower,** 34th President of the United States

2. IT DOESN'T ALL NEED TO BE MIGRATED

Recognizing that not everything needs to be migrated over to your new environment can be painful. The Eisenhower Matrix helps your team decide what needs to happen versus what some team members would like to happen.

These can be tough but highly productive conversations. If you're a law firm, there are obvious conversations that need to happen with your clients. If you're an organization, there are questions related to data retention strategies. In either scenario, documenting everything and working with the professional services firm you've
retained can help you stay proactive.

3. EVERYONE NEEDS TO PLAY WELL IN THE SANDBOX

Deciding what has to move, where it's going and what can simply be deleted helps you stay clear-headed about the rest of the approach. It is now time to ensure that your ingoing and outgoing e-discovery providers play well in the sandbox. It is so important to document everything up front and get sign-off from everyone involved that shows timelines, runways and strategies.

4. NOT ALL SOFTWARE TALKS NICELY TO EACH ANOTHER

The e-discovery industry has come a very long way from the old Concordance and Summation days. There is a lot of software to choose from and migrating away from one software provider to another may not always be the easiest. The following will be helpful:

▶ Have you created an inventory with your e-discovery data? In other words, have you documented data base names, counts of images, natives, records, OCRs, productions, tags, codings, highlighting, saved searches and redaction?

▶ How are redactions being handled? (This can go terribly wrong if the X and Y coordinates don't match up right.)

▶ If you're migrating more than 500GB of data, is that data being broken down into chunks so that it can be moved over easier?

▶ What is the new provider doing to avoid "two mortgages" (i.e., paying for the outgoing vendor to migrate while still hosting data while simultaneously paying for the incoming provider to import and host the data)? In other words, what does the implementation plan look like?

▶ What will the quality control process look like with the incoming provider?

▶ How will export issues be handled by the outgoing provider? With Relativity Server to Relativity Server, one must know the version numbers. With RelativityOne to RelativityOne, does the provider understand the nuances? With Relativity Server to RelativityOne, are they using **Relativity Migrate**?

5. PLAN A LONG RUNWAY

Don't rush the process. If you've inventoried your data, organized it using the Eisenhower Matrix, created documentation internally and with the outgoing and incoming providers, and everyone is talking about the path forward, then you are way ahead of the game.

This is something that should be planned out in advance to minimize and eliminate mistakes. If your incoming provider does not know how to do this, then it is likely time to find a professional services and advisory firm that does.

MOVE OUT DAY

Moving out is tough work. Just as your house has your most valuable assets, so too is your organization's data (or your client's data) their currency, their assets and their livelihood. It pays to work with a professional services firm that understands data security, data transparency, cost containment, and how to move correctly from Point A to Point B. That's why working with a **RelativityOne Certified, Gold Partner** with data migration experience is the way to plan your next move!

HAVE QUESTIONS OR WANT TO LEARN MORE? CONTACT US!

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