

# Operationalizing eDiscovery

Standard Operating Procedures & Metrics Every Litigation Support Department Needs

## 01 Identify an Internal Champion

This will be a: partner, high-volume litigator, management team member, or a tech-forward associate who sees the vision. Their buy-in is essential because they'll help navigate internal politics and push through resistance. Without this, your model won't scale.

## 02 Audit Your Current Landscape

Look across practice areas: who's handling eDiscovery, how, and with what tools? Is it consistent, or cobbled together with ad hoc solutions? What type of projects does the firm have? How are they being billed currently?

[See our eDiscovery Profit Checklist](#)

## 03 Map the Gaps & Opportunities

Design your ideal future state by matching current capabilities to future demand.

What tech or workflows are missing? What should stay in-house vs. go to vendors? Look for patterns (i.e.: repeatable tasks, lost revenue, or overbuilt systems) to start estimating ROI.

[Read our profit center blog](#)

## 04 Build a Pricing Strategy

Transparent, defensible pricing builds trust and protects margins.

To begin, choose your model: pass-through, cost-plus, or blended.

Adding a breadth of services that create billable value and help retain revenue that might otherwise leave the firm.

Start with billable hours, then create a structure that includes:

- Hosting, storage, analytics, project management
- Review protocol, search strategy, and managed review

[Read our pricing strategy blog](#)

## 05 Market Internally & Build Buy-in Firmwide

You'll need internal marketing to showcase your value. You're not just support, you're running a business unit:

- Give presentations on workflows and success stories
- Host demos or "roadshows" to explain what you do.
- Partner with a vendor for added credibility

[Read our hybrid approach blog](#)

## 06 Establish a Scalable Hybrid Model with the Right Vendor Partner

Find a partner that fits your model, one who's flexible, strategic, and understands your workflows. The right vendor fills resource gaps, reduces fixed costs, and scales with your needs. Most internal departments can't scale to 10-12 people you might need when the large matters hit.

Bonus: they often provide cost modeling to support defensible pricing. Think of them as your quiet powerhouse.

## 07 Launch, Standardize, & Iterate

Roll out your model with documented SOPs and workflows. Track metrics like revenue per GB, turnaround time, and team utilization. Celebrate wins, report impact, and keep refining.

This is how you turn eDiscovery from cost center to profit driver.