



CASE STUDY : PROCESS OPTIMIZATION

Litigation Support & Application Development for a Financial Services Organization

“Major Oak is large enough to have a pool of consultants to help their clients, but small enough to be flexible in their approach in order to best assist them.”

CLIENT

Legal area of a Fortune 500 Global Financial Services Company

CHALLENGE

Redesign the email archiving process to reduce the volume of emails and improve discovery search speed

RESULTS

- A custom solution that more efficiently and effectively archives email required for legal discoveries
- 50%+ reduction in email volume archived (12 terabytes of storage) and an associated \$3M in savings annually
 - Smaller archive drives significantly faster legal searches and reduced liability exposure

Major Oak Consulting
65 South Street, 2nd floor
New Providence, NJ 07974

908-771-5500
866-747-2738 fax

info@majoroakconsulting.com
www.majoroakconsulting.com

Background

A challenge impacting many organizations today is how to best manage the high volume of email that must be archived for legal discovery purposes. Our client's current process was to archive ALL emails using an external archiving vendor. The cost for this service was growing exponentially due to increased annual email volume. A project was initiated to reduce the volume of emails being archived and decrease the lengthy email archive search times.

Project Details

Major Oak Consulting was hired to develop the project approach, manage the daily project activities including business solution definition, archiving rules, new business processes and the development of a custom VB.NET application. The project required cross department interaction and coordination between Legal, IT, Compliance, HR, Finance, Business Units and external storage vendors, each playing an integral part in the initiative.

During the project activities, Major Oak discovered that a large volume of emails were potentially being archived unnecessarily. After careful analysis and research, it was determined there were duplicate emails being created in the archiving procedure that did not need to be archived going forward. These duplicate emails accounted for 12 terabytes of storage annually.

Major Oak worked with all stakeholders to identify and document detailed rules to determine the emails to be archived based on business need, job roles and regulatory requirements. The rules were built into a custom application, which removed non-required emails from the archive updates and generated a file that is sent to the external storage vendor. In addition to the cost savings (\$3M+ annually) realized by reducing the email volume archived, our client improved its risk management by properly decreasing the amount of discoverable information available.

The Major Oak Difference

Major Oak successfully managed the full project lifecycle including creating and executing the project plan, maintaining issue and risk logs, driving the issue resolution and risk mitigation plans, and coordinating all cross -department activities, including application development, to ensure stakeholder goals were aligned. Major Oak's involvement helped the project deliver results far greater than originally anticipated both from a cost reduction, performance improvement and risk management perspective.