

CLIENT SERVICES & PROJECT MANAGEMENT OVERVIEW

Client Services and Project Management are core focuses for Inference Data. We recognize that the strength of project management ultimately ensures the success of a matter. Inference offers case management, training and support through our client services team with 24/7 coverage.

With the complexities involved in discovery and review, Inference Data employs a consultative approach to client services and project management. For each case, a dedicated senior project manager is assigned to handle the complete lifecycle of a project, including case workflow and logistics, training, day-to-day management, status reporting and client requests. In addition to a senior project manager, each project is assigned a second team member to ensure complete 24/7 coverage for the duration of the case.

Inference Data does not charge for project management or support. Our philosophy is to provide the most comprehensive services available without a focus on additional hourly billing. Because of this commitment, our project managers are able to concentrate on the needs of the client, offering professional guidance and assistance. Inference pricing is predictable and ensures that all billing tightly matches the original estimates. Client support fees are often significant charges from other providers, and this line item should be considered when compared to Inference Data's flat fee pricing structure.

CASE MANAGEMENT

Every project has different challenges and requires up-front and ongoing communication. In order to jump-start the process, Inference Data's standard procedure is to conduct a project inception meeting at the onset of an engagement. Organized by the assigned project manager, the focus of the meeting is to review specific case requirements, including:

- Introduction to the designated Inference project management team
- Review of site set up requirements and specifications
- Plan data types, media and delivery schedules
- Discuss and outline key milestones and deadlines
- Establish "Go Live" expectations and requirements
- Define user and group level features and security access
- Outline client requirements and workflow specifications
- Establish training schedules

This meeting will also cover any project requirements and specifics to be managed by Inference Data, from privilege logs to productions to deposition preparation and export for trial.

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TRAINING

To ensure that the case team and reviewers receive the maximum advantages of the system's analytic and review features, Inference provides two levels of training:

- ***Analytics Training.*** Designed for administrators and counsel, the first training session is a comprehensive session to review the analytic features of the system and to ensure the most effective and efficient review plan is implemented.
- ***Reviewer Training.*** The second training session is designed to educate individual contract reviewers on the basic operations of the system and use of the features and functions to which they have access.

SITE SETUP

Because there is no substitute for experiencing a live system, Inference Data provides clients with access to their customized site, loaded with test data, before the commencement of review. Use of the test site provides administrators and counsel with the opportunity to evaluate the set of Collections and Folders, analytics features and review tools before the review begins. By enabling access to a client test site, users have the ability to address workflow issues and make adjustments to ensure that review is as efficient as possible. This test site approval process is provided at no cost to the client and is managed by Inference's Client Services group.

24/7 SUPPORT

Inference Data understands that attorneys and reviewers require consistent 24/7 support and system availability. To ensure that our clients' expectations are met in these areas, Inference Data operates under a tiered support organization for rolling coverage, using a multiple rotational schedule. The Client Services group is available through the support line and email at all times, day and night.

Client Support Line—877.534.5503

Client Support Email—Support@inferencedata.com