

E-discovery Paralegal Boot Camp



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About the Paralegal Boot Camp

The Paralegal Boot Camp's mission is to help paralegals become valued, indispensable members of the legal team and doing work that is challenging and rewarding. We do this with our skills-based programs that bridge the gap between what they teach in a paralegal certificate program and the work that a paralegal does every day on the job.

How do we do this?

We ask attorneys and managers across the country: What skills do you value most in your paralegal professionals? And we listened to their answers! Then we used that input to develop courses that add value to a paralegal's career.

Since the Paralegal Boot Camp was founded in 2010, we have provided training for thousands of paralegals throughout the U.S. and Canada. The courses are designed with the mindset that paralegals are busy, and their time is limited. So get them the tools and resources they want in the shortest amount of time.

There are many paralegal training options out there if all you want to do is collect a few CLE credits. If you want to change the trajectory of your paralegal career, choose the Paralegal Boot Camp.

Course Summary

Do you want to be the "go-to" person on your team when it comes to managing e-discovery projects? This course will help you easily transition to the role of an E-discovery Paralegal.

The E-Discovery Paralegal Boot Camp gives you the tools to **develop industry-recognized best practices** for managing your e-discovery projects instead of letting the projects manage you.

As part of this course, **you get our 20+ page template**, the *Standard Operating Procedures Manual* to use on future e-discovery projects to ensure that your e-discovery projects go smoothly. You can download this template in Word format so that you can easily edit the document to make it specific for your project.

The E-discovery Paralegal Boot Camp starts with the identification and collection phases of a typical e-discovery project and takes you through to the production phase, showing you how to incorporate project management principles into each phase.

Fuel your litigation paralegal career with the E-discovery Paralegal Boot Camp.

Course Format

The course is available as an on-demand online course that you can take at a pace you are comfortable with. You can start and stop the course as often as you like. Upon enrollment in the course, you can immediately access the course from the "Dashboard" section in your account page. You will also receive an email with your enrollment information and login credentials.

Course Length

It will take approximately 12-13 hours to complete the entire course, which includes approximately 9 hours of video lessons, reading assignments, writing assignments (not graded – for your own use) and knowledge assessments to make sure you are retaining what you are learning.

Continuing Legal Education Credits

This course is NALA-Approved for 9.0 CLE credits. Continuing education credit is also available in states that accept reciprocal credit for NALA courses, such as the Florida Bar's FRP, Texas, Ohio, California and others.

Course Curriculum

Module 1: An E-Discovery Overview

Module 1 provides paralegals with the history, terminology and background to become familiar with the practice of e-discovery. This unit reviews each phase of the E-Discovery Reference Model to better understand how a paralegal can assist in managing each of those phases, together with a review of the significant case law that a paralegal should be aware of.

- Basic knowledge of e-discovery
- Define electronic discovery
- Understand basic workflow models
- Understand the rules and principles that govern e-discovery
- Understand key issues in e-discovery case law

Module 2: E-Discovery Project Management Basics

Module 2 provides instruction on the general project management principles that should be considered for e-discovery projects. This module gives you a better understanding of the e-discovery stages that should be in your Standard Operating Procedure (“SOP”) and provides paralegals with the tools to draft your own SOP to use on every e-discovery project to make sure your organization has a defensible and repeatable process.

In this module, you will download our 20-page template to help get you started on drafting your SOP. As you complete each module, your writing assignment is to incorporate what you learned in that module into your SOP.

Module 3: E-Discovery Technology

To have an understanding of e-discovery project management, a paralegal also needs to have an understanding of the available technology – from the client’s side and from the law firm/outside service provider side. This module walks you through the technology considerations for each phase of the EDRM and provides product demos to get a feel for what the technology products offer during different phases of your project.

The E-discovery Paralegal Boot Camp does not provide technology training because this course focuses on the project manager aspect of an e-discovery project, and because there are many resources available for free e-discovery technology training. In this module we review some of those resources that are currently available to paralegals.

Module 4: Managing the Processing Phase

Module 4 gives you the tools to incorporate project management principles into the Processing Phase of your e-discovery project. As we start our processing project, this module covers steps such as:

- Assessing the Data/Planning for this phase
- Selecting the Data, Preparing the Data and Validating the Data
- Preparing for your team status meeting
- Follow-up planning questions and issues to be aware of during the processing project

Module 5: Managing the Review Phase

Module 5 takes the paralegal through the EDRM's Workflow for the Review Phase and provides instruction on the e-discovery project manager's role in the Review Phase of the e-discovery project. Upon completion of this unit, users will be able to:

- Identify methods to limit the scope of the document review
- Determine the strategy/plan of the review project
- Planning for the review workflow and how various elements can affect the review project
- Tips on managing the reviewers
- Use quality control steps to put into place for every review project
- Identify case law affecting the review phase

Module 6: Managing the Production Phase

Module 6 provides users with best practices to follow during the production phase of an e-discovery project, including the planning phase of production which begins at the beginning of every e-discovery project. Upon completion of this module, you will be able to:

- Apply e-discovery project management methodologies to the planning of the production phase of e-discovery
- Have a comprehensive understanding of the best practices for production
- Distinguish between the pros and cons of the various production formats
- Understand different delivery methods for a smooth production and completion of the e-discovery project

Forms and Templates Included in the Course

Like all of our Paralegal Boot Camp® courses, we want to give you out-of-the-box solutions to make your job easier. This course includes forms and templates in a format that you to download, edit and use on your e-discovery projects, including:

- ✓ Standard Operating Procedures Manual (a 20+ page template to guide you through each phase of an e-discovery project and use as a planning tool for upcoming projects)
- ✓ E-discovery Budget Calculator
- ✓ Collections Checklist
- ✓ Processing Checklist
- ✓ Vendor Comparison Chart
- ✓ Production Checklist
- ✓ Production Log
- ✓ Privilege Log
- ✓ And more...

Meet the Instructors



Ann Pearson is the Founder of the Paralegal Boot Camp®. Ann develops training programs exclusively for the legal industry. The training is provided through live workshops, online courses and custom in-house training programs.

Prior to founding the Paralegal Boot Camp in 2010, Ms. Pearson had 20 years of experience in the legal industry, first as a litigation paralegal working in commercial litigation, construction and products liability. She later became the paralegal manager at McKenna, Long & Aldridge LLP (now Dentons), where she managed the paralegals and case assistants in their Atlanta, New York and San Diego offices. Ann was able to significantly increase the skill set, retention rates (job satisfaction!) and productivity of McKenna's paralegal group through methods that she now teaches in the Paralegal Boot Camp.

Ms. Pearson teaches courses for Emory University's Paralegal Certificate Program and is a frequent speaker at legal industry events. She has served on the Advisory Board of Brown Mack College's paralegal certificate program in Atlanta and is the former President at the Foundation for the Advancement of the Paralegal Profession (FAPP). Ann is a member of the American Society for Training and Development (ASTD), the Project Management Institute and the IPMA. She is the former VP Education for the Atlanta Chapter of the National Association of Women Business Owners.



Erika Santiago has experienced the extraordinary evolution of technology and litigation discovery since 1995. While assisting litigation teams in the development of defensible discovery management strategies, she has worked with law firms and corporate legal departments in the design and implementation of their litigation support departments. Erika has worked with AmLaw100 firms in various litigation technology roles from project management to trial support.

Today, Erika is primarily focused on teaching litigation support (E-Discovery) project management best practices backed by years of experience and knowledge of understanding project needs, setting & managing expectations, and utilizing available resources. Her previous teaching & training experience includes Miami-Dade Community College, Georgia Perimeter College and Emory University's Paralegal Certificate Program.

Testimonials – What Others Are Saying

The E-Discovery Paralegal Boot Camp is, by far, the most informative training I've attended. The material is presented professionally and sensibly. The instructors are knowledgeable about the subject matter and draw on real experiences to drive the point home. This training course is certainly helpful to paralegals as it specifically targets a paralegal's role in the e-discovery process and provides tips for delivering superior support to their supervising attorneys from collection to production. You won't be disappointed with this course! –Kim Barrett

I found the E-Discovery Boot Camp to be very valuable in that I was able to apply what I was learning while working on two large cases that involved using Relativity as our document management platform. Knowing the phases of the EDRM really helped me appreciate what goes into an E-discovery project and the amount of work and technology involved. High scores for a great program! –Jan Watson

I have been a paralegal for 35 years, nationally certified and sit on the paralegal certification Board for the SC Supreme Court. The E-Discovery Paralegal Boot Camp is a MUST for all paralegals in this day and time. You just proved to me that one is never too old to learn something new! It was worth it! – Karen M. Cummins

Several of my paralegals attended the Paralegal Boot Camp, and their feedback is excellent. Ann is hands-on and highly knowledgeable from years of experience. I'm sending more of my paralegals to her next boot camp. – Ashley Saba

The knowledge in this training program is invaluable to new and experienced paralegals alike and you will be impressed with the level of resources provided. – Erica Nantais

Every litigation paralegal should attend this Boot Camp. It has really increased my skill set. The forms and checklists were invaluable! – Angela Skeete

Over the last 23 years I have attended more presentations in various formats than I could ever hope to keep track of, and I was very pleasantly surprised to find that your webinar [Trial Prep Boot Camp] was helpful, very organized, on-point, moved along at exactly the right speed and was overall one of the most productive presentations I have ever attended. – Robin Cook

I learned more in your 1-day workshop than I learned in months of attending my paralegal certificate program. – Christen Matilainen

Contact Us



404-378-8370



support@Paralegal-BootCamp.com

Order Form

Name _____ Date _____

Email _____ Phone _____

Name (if different than user) _____

Email (if different than user) _____

Company/Law Firm _____

Street Address _____

City, State, Zip _____

Enrollment for 1 user – E-discovery Paralegal Boot Camp \$299 Due

You can order and pay for online at <https://paralegal-bootcamp.com/e-discovery-paralegal-boot-camp> to get immediate access to the course.

If paying by check, please allow 10-14 days after mailing check. The user will receive an email with enrollment and login credentials after payment is processed.

Complete this order form and mail with your check. Make check payable to:

PRM Education Group

P.O. Box 410975

Melbourne, FL 32941

(404) 378-8370

To request copy of W-9 for accounting records, email support@paralegal-bootcamp.com.