

Exterro Fusion™ Comprehensive Interview 4

Survey, gather and analyze potential litigation or compliance information

Conduct and manage interviews and aggregate information to drive legal, IT and business processes forward.

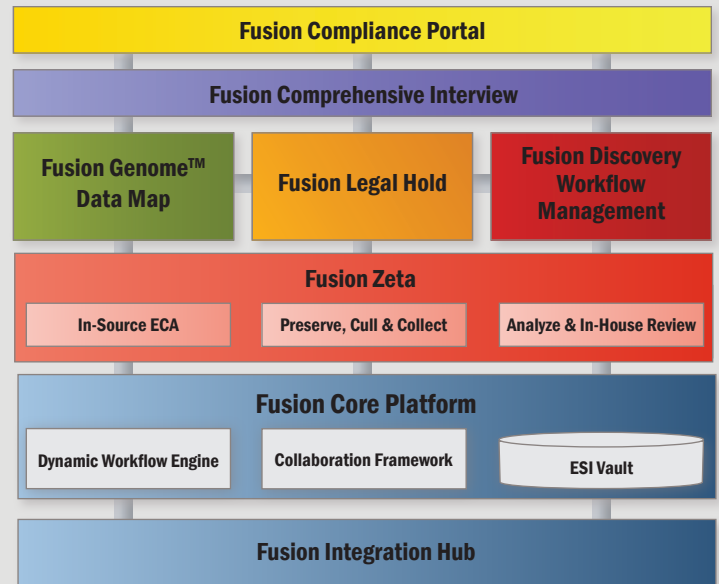
The Exterro Fusion™ Comprehensive Interview creates, manages and automates interviews and surveys for depositions, 26f preparation, data mapping projects, custodian identification, data preservation or collection, and other processes where critical information is needed to drive projects forward. The Comprehensive Interview's multi-tiered analysis aggregates collected information and delivers usable, timely and action-triggering insights to the right people.

The Exterro Fusion™ Comprehensive Interview facilitates information sharing and delivers clear, tracked collaborative communication across the Exterro Fusion™ solutions suite. It aids in the creation of an accurate and up-to-date ESI data map, accurate scoping and managing of legal holds, and complete discovery information collection, including keywords and date ranges, and can be used alone to gather information useful outside the rubric of legal processes.

The Exterro Fusion™ software suite features IT infrastructure and EDRM tool integrations, dynamic data mapping, litigation holds and a custodian compliance portal. Since the Exterro Fusion™ Comprehensive Interview is built on the Exterro Fusion™ Platform, users get visibility into and control over all legal governance, risk and compliance management processes.

“ With Exterro Fusion™ Interview Module, our clients schedule and organize surveys and interviews quickly. The Interview Module takes the busy work out of collecting data and delivering insights that drive business forward. It keeps employees engaged and managers in touch with the intelligence they need to lead effectively. ”

– Bobby Balachandran
President and CEO
Exterro, Inc.



Exterro Fusion™

Built to reflect how legal and IT teams think

Exterro Fusion is an integrated solution suite backed by the full power of the Exterro Fusion workflow and data management platform. Its collaboration framework, dynamic workflow engine, secure ESI vault and audit trails enable efficient execution of end-to-end e-discovery projects. The Fusion Integration Hub allows all Fusion solutions to integrate with the IT infrastructure already in use, like HR or asset management systems, as well as other EDRM tools. With Exterro Fusion, legal and IT teams get the benefit of the legal industry's most trusted platform and its 360-degree visibility into and control over all litigation tasks and projects.

ESI Identification Interview - Preview



Dear Respondent,

At our company we are striving to stay up to date and in compliance with all of your Electronic Stored Information (ESI). In order to stay in compliance we are asking for your assistance in updating the data sources that you are either a contact for or responsible for, in case of legal issues. Please answer the attached interview questions and answer to the best of your knowledge.



To learn how Exterro can deliver value to your organization, contact an e-discovery expert at info@exterro.com or call 877-EXTERRO.

Features and Benefits

Dynamic Intelligence Gathering: Use highly-configurable questionnaires, workflows and templates to poll the right people and surface important results

- **Smart Scope:** Auto-populate accurate survey participant list using HR integration to help with organizational and business unit scoping. Does away with tedious manual addressing.
- **Self-Survey or Supervised Interview Methods:** Control and conduct interviews the way you prefer, distributing some via email and others in person or over the phone. Enables interviews by proxy with executives and key parties to be recorded.
- **Templates:** Create process workflows and decision checkpoints using one of Fusion's user-friendly templates that streamline the survey creation process and ensure consistency across process.

Communications Management: Issue and manage interviews and questionnaires

- **Interview Dashboard:** Maintain project timelines and enable task escalation with a quick, project managers' view into interview progress.
- **Deadline:** Choose a deadline by which the interview must be complete and set parameters that, when met, drive the analysis step forward.
- **Reminders and Escalations:** Schedule interviews and set notification, reminder and escalation notices to ensure complete defensibility. Automate periodic reminders to show good-faith efforts and increase compliance. Automatically escalate unresponsive custodians to their supervisors.
- **Interview Portal:** Ensure custodians understand their obligations with clear, tracked communications delivered through a single touch point for all communication between interviewers and interviewees.

Visibility: Actionable insights drive defensibility and deliver control

- **Intelligent Interview Analysis:** View high-level information, trends, and key areas of interest for further action using intelligent analysis tools. Tabulate survey results in a relational database for flexible analysis and reuse vs. being trapped in emails or on survey forms.
- **Reports:** Measure responses with dynamic, comprehensive reporting capabilities. Easily access and monitor your entire process.
- **History management:** Search by configurable parameters and timeframes for rich history management and retrospective analysis.
- **Activity Logs:** Use automatically created and saved activity logs to aid in trial preparation, enable total defensibility, audit processes across solutions.

For Legal

- Feeds the front end of the litigation process with actionable information
- Aids with rule 26 disclosures and meet-and-confer preparation
- Automates depositions and expert witness testimony
- Ensures compliance and defensibility

For IT

- Quick ESI identification
- Informs the creation of a dynamic data map
- Enables automated, flexible analysis without rekeying or tabulating
- Reduces manual effort needed for collection follow-up

For Executives

- Rapid time-to-value
- Automates business process improvement
- Reduces time and cost of information gathering and analysis

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