



Frequently Asked Questions

What is EDRM?

EDRM – the Electronic Discovery Reference Model – was created in May 2005 to address the lack of standards and guidelines in the electronic discovery (e-discovery) market – a problem identified in the 2003 and 2004 Socha-Gelbmann Electronic Discovery surveys as a major concern for consumers and providers alike.

The completed reference model provides a common, flexible and extensible framework for the development, selection, evaluation and use of electronic discovery products and services. The completed model was placed in the public domain in May 2006.

In its on-going effort to provide standards and guidelines, EDRM is updating and expanding the original model to include working groups focused on composing a Code of Conduct, developing metrics to track e-discovery costs and activity, and creating an XML standard to simplify data interchange.

Who is involved?

EDRM was co-founded by e-discovery experts and consultants George Socha and Tom Gelbmann. Since 2006, over 300 e-discovery experts, vendors and end-users from more than 125 organizations have worked together to develop standards and frameworks for addressing e-discovery challenges. A list of current participating organizations can be found on the EDRM Web site at http://edrm.net/2007-2008_participants.php

What is the group trying to accomplish?

In the 2008-2009 year, EDRM will focus on four projects designed to educate e-discovery consumers and providers, simplify the industry landscape, and improve and streamline e-discovery processes. The projects are:

EDRM Evergreen: This project is aimed at ensuring that the Electronic Discovery Reference Model remains current, practical and relevant in the ever-changing e-discovery landscape. The participants in this project will work to enhance content at each node of the model and educate end-users about how to make effective use of the model.

EDRM Code of Conduct: The goal of the Code of Conduct project is to develop voluntary ethical guidelines for electronic discovery providers and consumers. Ultimately, these guidelines will be akin to those under which attorneys, court personnel and others in the legal space operate. The group will deliver materials and Webinars to discuss the meaning and use of the newly established code.

EDRM Metrics: This group will work toward completing the EDRM Metrics model which aims at providing an effective means of measuring the time, money and volumes associated with e-discovery activities. In addition, the Metrics model group is responsible for creating tracking, reporting and measurement protocols to assess e-discovery activities, and, to the extent metrics data becomes available, begin analysis of that data.

EDRM XML: The EDRM XML project will help practitioners significantly streamline processes and enable the integration of multiple e-discovery technologies. In the 2008-2009 project year,

this group will continue development of version 1 of the EDRM XML schema, including the validation tools and related materials. Additionally, the EDRM XML group begin development of version 2 of the EDRM XML schema, which will focus on adding “project” data or the data about what is done with ESI, and also promote the use of the EDRM XML schema.

I’m part of an in-house legal team. Does this apply to me?

Yes. In-house legal teams increasingly must participate in e-discovery activities. That means in-house teams need to understand the step-by-step e-discovery process. It also means others need to understand the e-discovery needs of in-house legal teams and the clients they serve, the constraints under which they work, and their goals and aspirations. EDRM provides a forum for sharing advice and best practices; a vehicle for conveying needs, desires and limitations; and a mechanism for helping to develop a simple and easy-to-understand framework for grasping the current state of e-discovery.

Does EDRM provide consulting services?

No. The EDRM is a guidelines and standards body designed to educate about e-discovery challenges, vendors and processes. The founders of the organization, George Socha and Tom Gelbmann, each provide consulting services through their independent endeavors. In addition, many of the EDRM participating organizations provide consulting and guidance to law firms, corporations, governmental bodies and other enterprises dealing with e-discovery issues.

What is the evaluation/screening process for organizations that are looking to get involved?

EDRM is open to everyone. Participants are required to contribute their time and expertise, without which the projects could not function and would not succeed. It is expected that participants will offer relevant and valuable assistance to the EDRM Projects. Participants are also required to pay an annual fee to participate in ongoing activities and project work.

How can EDRM help me/my organization?

EDRM serves as a guidepost for organizations perplexed by the costs and complexities of e-discovery. This is a new and emerging problem for most law firms and in-house legal teams, thus the majority of those faced with e-discovery are unsure of how to proceed or where to look for assistance. EDRM provides a framework of processes, educational materials, and an index of solutions providers focused on addressing specific challenges of e-discovery.

What type of resource materials does the group publish?

EDRM supplies guidelines, standards, whitepapers, research materials, Webinars, news, data sheets and other items to help educate e-discovery consumers and providers. These materials can be found on the EDRM Web site, <http://edrm.net>, as well as on the Web sites of most participating organizations.

What other industry experts have validated EDRM?

Major industry analyst firms including Gartner, Forrester and IDC have all embraced EDRM as a credible and legitimate framework for addressing issues relating to e-discovery. Nearly all of the leading vendors in the space have adopted the EDRM framework and are working to design their products around this model. Further, legal industry pundits including Monica Bay, Craig Ball and others agree that EDRM is the most comprehensive and accurate resource available today for understanding e-discovery.