



## Case Study: The Cleveland Browns Score Big with Sherpa Software's Altitude IG® eDiscovery and Policy Enforcement Platform

### CLEVELAND BROWNS

#### Highlights

Country: United States

Industry: Professional Sports Franchise

#### Corporate Profile

The Browns are a professional American football franchise in Cleveland, Ohio, who are members of the North division of the American Football Conference (AFC) of the National Football League (NFL).

#### Business Challenge

Three years ago, the Browns were performing eDiscovery searches with Sherpa Software's Discovery Attender product. They liked the quick and easy search of email, but were in need of a more robust enterprise-wide platform that could also accommodate litigation hold and allow their IT and legal departments to coordinate efforts in a single solution.

#### Business Solution

The Browns implemented Sherpa Software's Altitude IG® platform for eDiscovery and policy management. This feature-rich tool would enhance collaboration between IT and legal allowing them to organize the overall process and add the much needed litigation hold process. They also replaced their old and unreliable file share management system with Altitude IG policy enforcement.

#### Results

The Browns quickly realized the benefits of Altitude IG, estimating they **reduced the time to conduct searches by 65%** and **reduced the amount of data necessary to turn over to counsel by 60%** due to elimination of "noise." They also implemented policy enforcement that immediately **recaptured 2 TB's of storage space** on their public file drive.

*"The results and support have been great and we are looking forward to conducting our review process quicker and easier."*

- Brandon Covert, Director of IT, Cleveland Browns



#### Litigation and increasing volumes and complexity of ESI creates challenges

The Browns began using Sherpa's on-premises search and collection tool, Discovery Attender, in 2012. They selected this tool based on its quick, easy installation and user-friendly interface that makes email and file searches a much simpler task. But the complexity of litigation requests meant they quickly outgrew the scope of Discovery Attender. Therefore, the Browns needed a more robust enterprise wide solution that would offer the same ease-of-use as Discovery Attender.

As a lawsuit resurfaced, the Browns decided to intensify their search for eDiscovery software. In addition to accommodating their changing eDiscovery needs, the Browns also wanted a solution that could incorporate a litigation hold process. Although policy enforcement wasn't a prerequisite, they were facing storage related issues that required a more reliable information/policy management tool as well.

## The Search Begins and Ends with Sherpa Software

As the Browns began their search, they focused on the foundation built by using Sherpa Software for the last few years. They would need to find a solution that would offer the same flexibility, ease-of use, and cost-effective options they came to know and love in Discovery Attender. Initially unaware that Sherpa had launched a new SaaS platform for eDiscovery and information governance, the Browns began looking at various tools. They leveraged the close knit environment that is the NFL to solicit referrals from other teams and they also reviewed Gartner research to build a short list of possible solutions. They quickly realized that from both an investment and operational perspective, these solutions were not a good match for their organizational needs, so they contacted Sherpa Software to investigate other options and were introduced to Altitude IG.

Altitude IG satisfied the Browns' key objectives of a cost-effective and easy-to-use system from an organization they've trusted for more than three years. In addition, they benefitted from Sherpa's flexibility which enabled them to recommend added features and functionality to help further advance the product specific to their needs. For example, returning the full text of search results is one area where they were involved in forming the solution roadmap. Although policy enforcement wasn't a prerequisite, they were also in the process of recreating document retention standards and trying to enforce policies. The Browns initially thought they would need two different solutions for eDiscovery and policy enforcement and were pleasantly surprised that Altitude IG offered a comprehensive, cost-effective solution to meet all their needs from one platform.

## The Implementation and Use of Altitude IG

### *eDiscovery*

The Browns process for eDiscovery includes IT, general counsel, paralegals, and several interns. The search, collection, and review process needed big improvements. The inefficiencies were illustrated by IT needing to relinquish their offices to the legal team in order to complete the internal review process once searches were complete. Altitude provided a feature-rich tool that could enhance collaboration between departments by allowing web-based access, administration, and a role-based architecture. Search and review of results can be done from any device with a web browser so IT can efficiently initiate searches of the infrastructure while the legal team determines the relevance of those search results.

In addition, litigation hold was a major concern. Altitude IG's eDiscovery module provides an established and repeatable plan that allows the Browns to react quickly to legal hold requirements and help avoid evidence spoliation while reducing risk and expense associated with manual legal hold tracking. The system tracks multiple matters and holds while also eliminating the manual process and spreadsheets they needed to share between IT and legal. The new legal hold notification greatly reduces the time it takes the Browns to set up and execute a hold by automating resending and reminder notices and acceptance by custodians. In addition, the legal department can now customize legal hold templates that are sent and includes the ability to send customizable questionnaires with the notices.

### *Policy Enforcement*

The internal public drive used to share documents between the Browns' departments had turned in to a "wild west" of storage locations. All personnel including vendors, partners, and interns could see and save information to the shared drive. The Browns had tried to incorporate their own process to delete documents from shared storage after 30 days, but unfortunately, the system proved unreliable. They replaced it with Altitude IG policy enforcement. "We have run our policy already on a public file share to identify older content and delete it. Our old system was unreliable so we replaced it with Altitude IG and the system is running great. Now we have no more worries," said Brandon Covert, Director of IT.

## Ease of implementation and support

The Sherpa customer success team has worked with the Browns every step of the way to implement Altitude IG. “The Sherpa support team has been great. They take the lead on any issue during the installation and communicate throughout so we understand it and can manage it moving forward,” said Covert. “We don’t want to rely too much on a third party and they keep us involved. Since the install, it has worked great. If there is an issue, Sherpa usually reaches out to notify us and request access to fix it before we are even aware an issue exists,” added Brandon.

## Results and Current State of the Project

The Browns are extremely pleased with the upgrades to their processes that Sherpa and Altitude IG have added. “We are only using approximately 20% of what Altitude IG can do,” said Covert. “The results and support have been great and we are looking forward to conducting our review process quicker and easier,” he added. “The bulk of the time in eDiscovery is reviewing and tagging and Altitude is a huge benefit for us in that respect.”

Benefits for the Browns in using Altitude IG:

- **Reduced Result Sets for Review by 60%:** The Browns estimated 60% less data is needed to be collected and handed over due to elimination of “noise.”
- **Recovered 2 TB’s of Storage:** After public folder reclamation through Altitude IG policy enforcement, the Browns reclaimed over 10% of their storage space, which is a huge win for the organization.
- **Reduced Collection Time by 66%:** IT completes their search and collections in approximately one-third the time. No errors means searches are conducted once and completed quickly.

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*The NFL has their own best practices but each team is on its own to implement a solution. Security and performance are a high priority and we found it imperative to work with people we can trust. Sherpa Software and Altitude IG are perfect for our workflow and vision of what an eDiscovery solution should be. - Brandon Covert, Director of IT*

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## What’s Next?

The Cleveland Browns are already looking to the future and Altitude IG is a big part of that strategy. They are planning email retention for storage and liability as well as the possibility of classification down the road. In the meantime, the Browns will continue to implement policies to manage electronically stored information with Altitude IG and are confident they have a trusted and reliable system for all their policy, eDiscovery and reporting and analytics needs.