

IDC MarketScape

IDC MarketScape: Worldwide eDiscovery Early Case Assessment Software 2022 Vendor Assessment

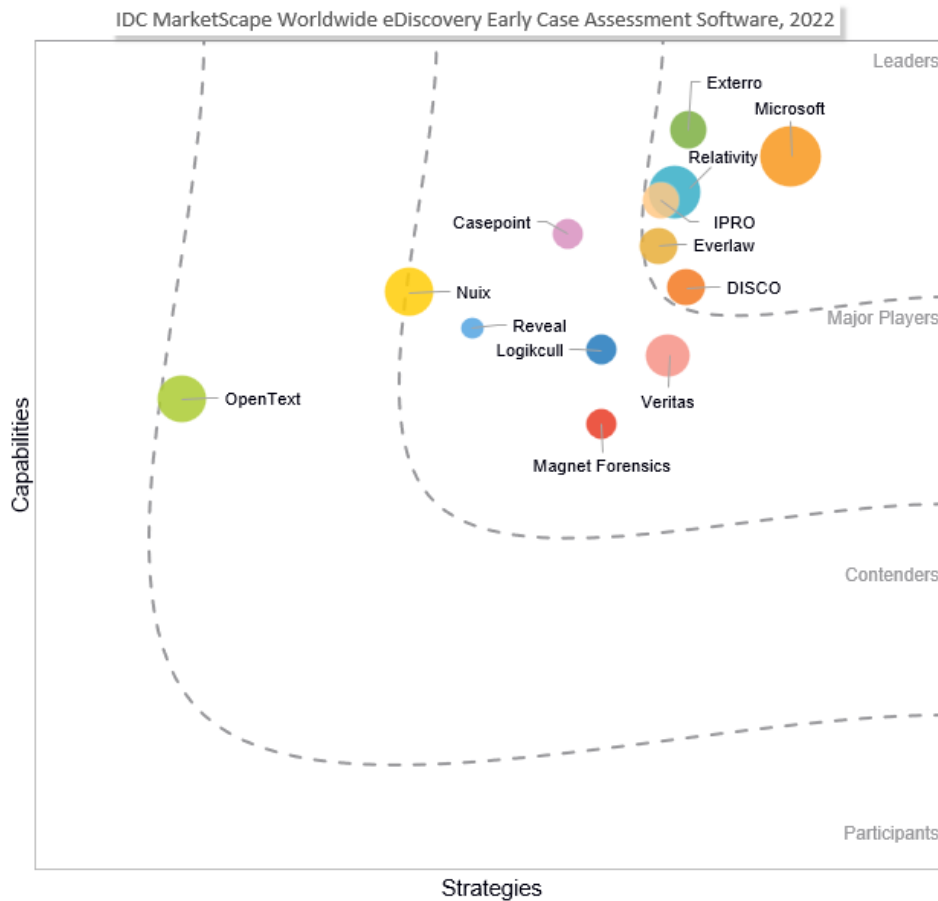
Ryan O'Leary

THIS IDC MARKETSCAPE EXCERPT FEATURES IPRO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide eDiscovery Early Case Assessment Software Vendor Assessment



Source: IDC, 2022

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide eDiscovery Early Case Assessment Software 2022 Vendor Assessment (Doc # US48970222). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Review continues to be the costly aspect of ediscovery despite technological advances. Proficiency at early case assessment continues to be a hallmark of mature ediscovery practitioners. This IDC MarketScape covers major vendors participating in the worldwide ediscovery software market with a focus on functionality for early case assessment. This vendor evaluation is based on a comprehensive criterion expected to be most conducive to success in providing tools to enable collecting, processing, culling, and analyzing data in junction with investigations and litigations. The evaluation criteria emphasize capabilities and strategies that enable the minimization of the data corpus and mitigate cost. IDC expects critical success factors for early case assessment ediscovery software to be:

- Cloud-to-cloud data ingestion connectors that enable customers to ingest cloud-native data with the click of a button
- Cybersecurity that must be a point of emphasis considering the heavy fines and reputational damage associated with data breaches
- Transparent and predictable pricing
- Strong analytics and machine learning functions that enable de-duplication and culling of data
- Comprehensive ability to collect and process data from a wide variety of devices and applications

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The inclusion criteria for this IDC MarketScape required vendors to have at least \$10 million in yearly revenue related specifically to selling ediscovery software and to have functionality that is specifically tailored to the early case assessment use case.

ADVICE FOR TECHNOLOGY BUYERS

The majority of costs associated with ediscovery are still associated with the review process. That is the piece that requires the largest head count and time to complete. The burn rate of review is a direct function of the volume of the corpus of data and the speed of the reviewers. Reviewer speed can only be improved so much, but the volume of data is often way larger than it needs to be. Often, ediscovery can be an afterthought for organizations, and they will overcollect everything remotely related to an investigation or litigation. Spray and pray method of collection leads to incredible cost overruns. Proactive and thoughtful ediscovery practitioners will optimize their early case activities to ensure that only the documents most likely to contain responsive materials are collected. Ensuring the data set is

narrowly tailored can save millions of dollars a year. Organizations must prioritize investment in technology that can effectively create the smallest corpus possible. The days of collecting every document in a custodian's possession should be over. Targeted and thoughtful collections buoyed by analytics, de-duplication, and searching will be the standard going forward.

While good ediscovery practitioners are worth their weight in gold, they need the right technology to be able to effectively deploy their craft. When evaluating technology to optimize your early case assessment workflows, it is important to consider the types of data that you will be collecting and the makeup of your legal operations department. Within the market, there are a variety of players that can suit an organization's needs. Not every organization needs deep analytics and artificial intelligence (AI) to cull their data. Introspection is necessary before any technology purchase. Does your organization need a cloud solution? Do you have a significant volume of on-premises or legacy data that needs attention. Digitally transformed organizations should focus on vendors that enable preservation in place, while those with a variety of data types perhaps may want to engage with vendors with a large partner network. Buyers need to focus on what strategies will enable them to cull data the best.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

I PRO

I PRO is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide ediscovery early case assessment software.

I PRO is an ediscovery software vendor that has been servicing the market since 1989. I PRO is based out of Tempe, Arizona, and methodically built the company over the past few decades without major funding rounds. I PRO has focused on steady growth and stability while servicing mainly the law firm and corporate market from SMB all the way to the Fortune 500/Am Law 100. I PRO has built a loyal customer base just by building a reliable product and not with splashy marketing stunts. I PRO prioritizes its ability to scale and deliver outcomes. I PRO does not offer managed review or other adjacent services; the company simply focus on its product.

Strengths

- **In-place ECA:** I PRO offers the ability to not only preserve data in place but assess it in place. This means that the users can deploy analytics, collect smarter, and overall limit the amount of duplication and moving of data that needs to be done. In-place ECA has security benefits in that the data is not being moved or exposed outside of where it lives and empowers the legal teams to take actions without depending on IT's priorities. I PRO users can get insights into the data first then make the decision about what to collect. This capability drastically shrinks the corpus of data that is ultimately moved into a review tool.
- **Scale and value:** Customers interviewed in conjunction with this study indicated that the scale provided by I PRO for the price paid was very favorable. The platform is able to handle many terabytes of data and quickly. Some customers reported being able to complete ECA with minimal staff in just a few days because of the ability to drive insights at scale.

Challenges

- **Performance can falter at scale:** Customers reported that although the ability of the product to scale and ingest large volumes of data is tremendous, this sometimes causes performance loss. The application's responsiveness can suffer at scale. Buyers will need to decide their priority when assessing IPRO. Customers indicated that the performance issues were not insurmountable and did not detract from the overall customer experience but were noticeable at scale.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

eDiscovery applications span the Electronic Discovery Reference Model (EDRM), including early case assessment applications, ediscovery review applications, full-spectrum ediscovery suites, and applications focused on individual EDRM components. These applications also capture and store real-time network and device data and identify how business assets are affected by network exploits, internal data theft, and security or human resources (HR) policy violations. eDiscovery applications support and enable both internal and external investigations.

These applications automate business process management and data management activities during early case assessment, early data assessment, collection, review, analysis, and production. These applications offer not only search, text analytics, and data mining functions but also business process workflow automation, project management, document management, and decision support mechanisms. In most instances, these applications are offered as either standalone full-suite products or complementary software products. In some cases, specific applications are offered solely as add-on modules that run atop proprietary archiving or enterprise content management platforms.

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide eDiscovery, 2022* (IDC #US46970121, July 2022)
- *2022 Corporate eDiscovery Survey* (IDC #US47699422, June 2022)
- *Worldwide eDiscovery and Forensics Applications Software Forecast, 2022-2026* (IDC #US47699622, June 2022)
- *Worldwide eDiscovery and Forensics Applications Market Shares, 2021: Relativity Continues to Lead the Market Despite Strong Competition* (IDC #US46970521, May 2022)

Synopsis

This IDC study represents a vendor assessment of providers offering ediscovery early case assessment software through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for offering ediscovery early case assessment. The evaluation is based on a comprehensive and rigorous framework that assesses how each vendor stacks up, and the framework highlights the key factors that are expected to be the most significant for achieving success in the ediscovery early case assessment market over the short term and long term.

"When evaluating technology to optimize your early case assessment workflows, it is important to consider the types of data that you will be collecting and the makeup of your legal operations department. Within the market, there are a variety of players that can suit an organization's needs. Not every organization needs deep analytics and AI to cull its data." – Ryan O'Leary, research director, Privacy and Legal Technology at IDC

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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