



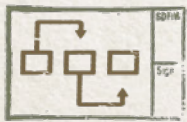
Top 5 Ways To Improve Your Subpoena Response



Control Intake

Receiving paper at multiple locations, emailing, scanning, and manual data entry are cumbersome, costly and error-prone processes. If you receive a high volume of subpoenas, publish instructions on your webpage to centralize and standardize the way you receive them. Consider an online portal where an issuing party can submit subpoena information directly, minimizing the cost and risk of error associated with manual data capture on your side. Your objectives should be to minimize paper, cut down on duplicate documents being served, and centralize intake as much as possible.

In addition to centralizing and modernizing the way you receive subpoenas, **you need a process that efficiently and accurately routes matters requiring legal review or escalated response** versus routine requests that are handled by an operations team.



Establish a Workflow

The lack of an established workflow causes delay and inefficiency. Implement workflows that cover response from intake to production

and payment. Every step that you currently execute manually—capturing subpoena metadata, tracking deadlines, generating invoices, creating external media and preparing shipping materials, tracking payments—is an opportunity for your team to improve. A purpose-built system automates data capture, tracking, invoicing, and delivery. Particularly if you have a complex operation, high volume of subpoenas, or cross-border requests, consider engaging expert help with designing an efficient and compliant process.



Ensure Secure Delivery

Outmoded and insecure data transfer methods continue to be a challenge for subpoena response teams. Many are still shipping responses on external media in violation of company security protocols. Safari SecureShare™ delivers documents via a secure online portal, and adds an extra level of security with two-factor authentication for an issuer to access files.

Companies have shared with us that if the response file size is too large for email, they encrypt the files on a DVD or flash stick – **often in violation of their own security policies** – and send them in the mail or via expensive mail courier.



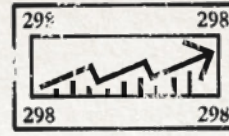
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Recover Your Costs

We commonly hear that an organization doesn't recover costs simply because there is no process in place to systematically prepare an invoice or enforce and track payment. If you simply send a request for payment along with your response documents, you're probably not getting great results. Instead, you could be using a tool to auto-generate an invoice, then ensure cost recovery with a paywall that allows document download only after the issuer provides payment information.

How do most companies currently attempt cost recovery? Some have checklists to send 2nd and 3rd reminders to issuers. Others have even tried sending invoices to collection companies. Automation is the only effective way to achieve cost recovery. Without it, you could be losing thousands, or tens of thousands, of dollars each month.



Track Your Metrics

Consider how you will maintain an audit trail and facilitate reporting. Issuers, types, subject matter, jurisdictions, numbers handled, turnaround times, subpoenas per employee, cost recovery—these and other metrics are fundamental to managing your team and telling your story.

What types of metrics will you track? Maybe you need additional headcount. You might see a repeat issuer who has failed to pay for previous responses. One employee may be handling twice as many responses as another.

With collected data, you can effectively manage your workload, identify risks to your organization, and tell the story of your team's value. In addition, understanding your per-subpoena response cost is key to establishing the response costs you should be recovering.



About Safari

Safari is an SOP response management solution for corporate legal process teams. It is the first and only solution to help companies manage subpoenas in a single system, deliver responses electronically, automatically recover costs, and provide unmatched security—all with built-in auditing and reporting. Implement Safari today to immediately reduce risk, recover costs, and save time. Learn more at safarilaw.com

Next Steps

- Sign up for a demo of the Safari Pathways product: safarilaw.com#contact
- Join the Legal Operators Social Network Subchapter: legaloperators.com
- Access our members area to view articles and webinars: safarilaw.com/resources
- Contact Mark Hentschell, VP of Sales at mark@safarilaw.com or 425.298.3620