



COST EFFECTIVE. EFFICIENT. DIVERSE.

Third-Party Subpoena Management

A high-quality, competitive solution for managing third-party subpoena responses

Third-party subpoena responses pose several challenges that require careful navigation—adherence to strict deadlines, the pressure of gathering and reviewing potentially large volumes of documents and data in a short timeframe, and understanding/compliance with the client's strategy for responding to recurring requests to produce business sensitive information.

OUR SOLUTION

Winston Legal Solutions handles subpoena intake, response, review, processing, and production for clients inundated with third party subpoena requests. WLS has the capacity to scale up or down depending on the needs of the client. Services include interviewing custodians, coordinating with client's counsel on document searches and collections, negotiating extensions and scope of response, negotiating search terms, drafting responses and objections, reviewing and logging responsive documents, and delivering productions to requesting parties. Clients' partnering with WLS allows us to rapidly develop a deep understanding of your business and operations, increasing the efficiency of every response and resulting in time and cost savings.

SERVICES INCLUDE:

- interviewing custodians
- coordinating with client's counsel on document searches and collections
- negotiating extensions and scope of response
- negotiating search terms
- drafting responses and objections.

CLIENT BENEFITS

Below are various ways in which this NDA service benefits clients.

- Cost Effectiveness. Clients get large law firm quality work product at extremely reasonable rates.
- Reputation and Credibility. Clients get the benefit of the respect and instant credibility of having an Am Law 50 firm on the letterhead.
- Deep Resources. The client benefits by having its lower tier/risk work done by the same full-service firm that is internationally known for handling the largest and most complex litigation. Thus, the client gets the full range of deep resources and capabilities in a "one-stop shopping" experience.
- Diversity. Clients benefit from having a diverse team of top-notch lawyers handling their assignments.

HOW WE GET THE JOB DONE

At the outset of each client engagement, we work with clients to establish a customized plan that considers your unique protocols, preferences for attorney involvement from WLS team and others, communication methods, and deliverables.

We recognize that each client's needs and expectations are distinct, requiring a tailored approach to ensure seamless integration with your in-house team.

We offer the workflow illustration below to give you an example of how we work with clients. This is just a sample of our flexible approach, designed to demonstrate our ability to adapt and provide bespoke legal services. Our ultimate goal is to ensure that your third-party subpoena response process is as streamlined and effective as possible, while maintaining the highest standards of legal scrutiny and protection.



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INTAKE OF SUBPOENA

- Create centralized repository for subpoena intake.
- Log subpoena including response dates and assign manager(s).



SUBPOENA

 Conduct initial review and develop a summary and list of questions for client.



 Set deliverables deadlines and identify associated costs.

COMMUNICATION

MEET AND CONFER

- Meet and confer with opposing counsel re scope of response with the objective of identifying custodians, date ranges and search terms.
- Request cost-shifting to facilitate response.

PREPARE RELEVANCE CRITERIA WORK-UP

 Prepare summary of potential custodians, search terms, and dates based on review of requests and communications with client and opposing counsel.



CONDUCT SEARCH TERM ANALYSIS

- Conduct search term analysis to determine appropriateness of search terms.
- Reengage with opposing counsel on terms, as necessary.
- Communicate with client to get approval on final terms.



COLLECT DATA FROM CUSTODIANS

- Coordinate collection of relevant documents
- Process and load documents to review platform (if necessary).

CONDUCT CUSTODIAL INTERVIEWS

- Coordinate with client regarding approved process for custodial interview.
- Draft custodial interview outlines and conduct interviews.



DRAFT AND SERVE RESPONSE AND OBJECTIONS

- Prepare draft responses and objections for client and outside counsel approval.
- Serve approved response.



COORDINATION WITH CLIENT

Prepare and provide a summary of engagement with client and/or outside counsel on the parameters of a response.



REVIEW AND LOGGING OF DOCUMENTS

- Prepare review protocol, train review team, and manage responsiveness review process.
- · Conduct privilege review and logging.



FINALIZE PRODUCTION SET AND PRODUCTION COVER LETTER

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