

Interview Guide

eDiscovery Project
Managers & Specialists

 THE COWEN GROUP



The Cowen Group
Suite 1606
211 East 43 Street
New York, NY 10017
www.cowengroup.com
+1 212 661 0025

Released 21 July 2014



Business Savvy



Business savvy is the ability to understand and deal with a business or financial situation in a way that will lead to a positive outcome for the team or department. A candidate with business savvy will possess a clear perception of business issues and have the ability to articulate how a business decision will affect their specific department and the firm overall.

Can you tell me about the structure of your current department?

How does your department fit into the business structure of your current firm?

What is the business model of your litigation support department?

How have you helped partners acquire or maintain clients?

What do partners look for from litigation support?

What do clients look for from litigation support?

How do you market your department?

What would you improve about your department?

Business Savvy (Continued)

How much client interaction have you had? Who is your client?

.....
.....

Provide an example/ describe a situation when you were the leader of a group.

.....
.....

Demonstrate an ability to differentiate between a transactional task-only view and a big-picture perspective.

.....
.....
.....

How do you market yourself?

.....
.....

What experience do you have creating and managing a budget?

.....
.....

Tell me about your business experience. Have you ever run or been an integral part of a growing business?

.....
.....
.....
.....

Professional Intelligence

Professional intelligence is the capacity to understand and communicate your specific role, authority, responsibility, and resources within a professional environment. A candidate with professional intelligence will be able to demonstrate a deep subject matter expertise and effectively communicate the professional strengths that they are bringing to the position. Indicators of professional intelligence will also include years of experience, professional development activities, and educational background.



Please tell me about your current position.

What is your current role and corresponding responsibilities? What authority and resources do you currently have?

What is the role of a project manager in eDiscovery is versus the role of a case manager in overall litigation?

How do you see the role of an eDiscovery project manager in the scope of overall litigation?

What is your involvement with the litigation timeline? Please tell me about a case where you have gone beyond electronic discovery.

What is your knowledge of and experience with document productions, privilege logs, and protective orders?

What is your understanding of discovery outside of the eDiscovery component?

Professional Intelligence (Continued)

What is your approach to the initial intake on a case? Please tell me about how you start management of a project.

.....
.....
.....

How do you go about planning when you are assigned a new case? What is your typical workflow when assigned a new case?

.....
.....
.....

Please provide an example of when you provided a suggestion on a case to save money and/or increase efficiency. If possible, please use an example where the suggestion was something that you had not done and seen implemented before.

.....
.....
.....
.....
.....

What do you consider a win in a case?
What are key success factors?

.....
.....

What are the top three things you would want to know about the client?
What would you ask a custodian?

.....
.....
.....

How would you describe a "complex" case?
Describe your experience with one.

.....
.....

Tell me about the types of clients at your current employer.

.....
.....

How would you prepare for a meet-and-confer?

.....
.....

Professional Intelligence *(Continued)*

How would you interview a client about their IT infrastructure and systems?

.....
.....

How do you influence a client to make choices? How have you talked someone out of a particular decision?

.....
.....
.....

How do you anticipate problems or difficulties that may arise?

.....
.....

What is your understanding of the litigation lifecycle?

.....
.....

What review platforms and technology are you most familiar with? Compare and contrast platforms. Give an example of a time when you used each. What did you like most/least, why?

.....
.....
.....
.....

What does it cost to process X GB of data?

.....

Tell me your understanding of current case law as it relates to electronic discovery. What are some of the most important cases in the industry?

.....
.....
.....
.....

How do you use case law to advise your legal teams?

.....
.....

What is your knowledge of or experience with applying eDiscovery-related federal rules of civil procedure? (i.e. FRCP 34(b)(2)(E)(ii) - form of production)

.....
.....
.....

Intellectual Curiosity

Intellectual curiosity is evidenced by a commitment to expanding one’s knowledge and ability due to intrinsic curiosity and not primarily due to external motivation or the requirements of a professional role. A candidate of high intellectual curiosity will have a demonstrated track record of acquiring knowledge related to their role above and beyond the basic requirements as well as intellectually stimulating topics that are not related to their current professional responsibilities.



What do you read or watch for pleasure? What do you read for eDiscovery industry news?

.....
.....

To what extent do you rely on social media for business/professional development?

.....
.....

Who do you associate with in the industry? What have you learned from them?

.....
.....

Are you actively involved in any professional organizations? What are they?

.....
.....

Demonstrate practical implementation of your knowledge.

.....
.....

Do you have any projects that you are currently involved with outside of work?

.....
.....

How are you continuing to educate yourself? Certifications, degrees, etc.

.....
.....

Intellectual Curiosity (Continued)

Is there an area of the industry where you are self-educated?

Where do you see yourself in 5-10 years? What are your goals short term and long term?

Where do you see the industry in X years? What is the future state?

If you had 5% of your time to spend on professional development, how would you spend it?

How would you outline, execute and measure your success? Given the time and resources, how would you go about learning {insert topic or professional skill}?

What have you done to share your knowledge/ experience?

Are there topics or activities where you could be the educator?

Political IQ



Political IQ is demonstrated by the ability to understand, operate, and excel professionally within the culture and politics of a team, department, and firm. A candidate with political savvy will perform in a manner that effectively accomplishes the team mission while effectively navigating the dynamics of interaction with their supervisors, peers, and subordinates.

You have just become aware that a privileged document has been produced. What do you do? What is your next step?

Has a partner ever made a request that didn't make sense from a cost, risk, or efficiency standpoint?

- How did you handle it?
- What was the potential to go south?
- When is the appropriate time to communicate?

Your client just gave you 100 GB of data that isn't planned for your budget. What do you do? What is your next step?

If a significant percentage of your data set is erroring out, what do you do and when?

What is "scope creep" and how do you handle it?

Political IQ (Continued)

How do you determine when it is appropriate to escalate a situation?

.....
.....

What do you do when you overhear a team member saying something wrong to an associate?

.....
.....
.....

Give an example of when it makes sense to use the “reply all” button.

.....
.....

How do you handle team members who manage up well, but don’t play well with peers or subordinates?

.....
.....
.....

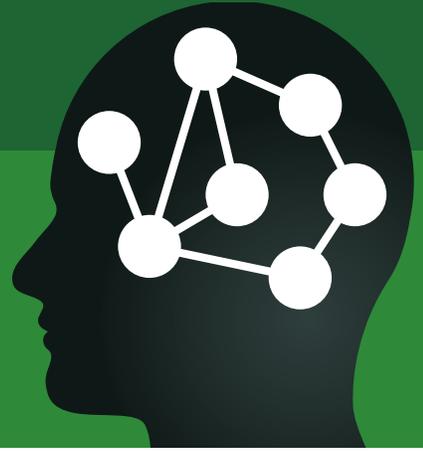
How do you interact with a colleague who isn’t pulling their own weight?

.....
.....

In your current position, how much autonomy do you have? Are you happy with that circumstance?

.....
.....
.....
.....

Social IQ



Social IQ is shown in the ability to navigate complex social relationships and environments in a professionally productive manner. A candidate with high social IQ will demonstrate strong likeability and will have a demonstrated track record of ethical and authentic professional conduct.

Who was your best boss and why? Who was your worst boss and why?

Whom do you keep in contact with from your previous positions? What is the nature of the relationship?

Have you ever had a mentor? What was their role inside and outside of the team? Who was your best mentor? How did that mentor help you?

What makes a great co-worker?

Who are your favorite co-workers and why?

If I called your current supervisor, what would he/she tell me about you? What would they say they liked most/least about you?

Social IQ (Continued)

Who do you feel comfortable providing advice to?

- Up: Partners, associates, supervisors?
- Down: subordinates?
- Out: peers and colleagues?

What would your ideal team look like?

How would you describe the culture of the team you work on? Do you prefer to work solo or as part of a team?

Who is the person you respect most on your current team and why?

How do you build relationships at your current firm? What about your previous firm? At which firm did you build the most successful relationships?

Who do you go to when you have a challenge?

- Legal
- Technical
- Process

Who comes to you with their challenges?

- Within your organization
- From outside of your organization

What is the most challenging client/ vendor situation you've ever dealt with?

Social IQ (Continued)

Are you aware of your impact on people?

.....

How do you get someone to open up in informal situations?

.....
.....

Who do you know that is really smart in the industry, and what is your relationship with them?

.....
.....
.....

Which of your industry relationships have been most important to your success?

.....
.....
.....

Tell me about a time when you realized you were presenting information in a way that was unproductive. How did you adjust the message?

.....
.....
.....

Tell me about a time when you provided guidance/advice to a team member who was using a practice or protocol that you disagreed with? How was that advice accepted or not accepted?

.....
.....
.....
.....
.....

Do you consider yourself to be an introvert or an extrovert?

.....
.....

What do you do to seek feedback?
How do you take it?

.....
.....
.....

Social IQ (Continued)

What kind of feedback would you want from me if I were to hire you?

.....
.....

How do you deal with difficult personalities?

.....
.....

Who was the most difficult co-worker you have ever worked with and why? What have you learned from it?

.....
.....
.....
.....

Describe how you see the firm/vendor relationship. Can you tell me about a vendor that you have a great relationship with and one that you don't?

.....
.....
.....
.....

What do you do when there is a crisis and it's not your problem?

.....
.....
.....

About

We would like to thank the esteemed members of our legal project management working group for contributing their knowledge and experience to the development of this interview guide.



Adam Pravda

Cheryl Garner

Jennifer Croessman

Patrick Burke

Amy Catton

Courtney Ozer

Jenny Lewis

Stuart Hubbard

Anthony David

Darcie Spruance

Jessica Robinson

Tom Breuer

Anthony Dobson

Gillian Glass

Joan Washburn

Wale Elegbe

Chad Papenfuss

Jason Lichter

Killian King