

## CLE Presentation

### Effective Keyword Culling

Attorneys today use various keyword culling strategies to reduce collected document populations prior to review or production. Whether negotiating the criteria in advance with opposing counsel or employing these strategies unilaterally, the goal is to reduce the population as much as possible, while fulfilling the obligation to produce what is required. Too often that goal is not fully met, leaving the legal team with too much to review and produce, or putting at risk the defensibility of their production.

In this CLE, linguist and Principal Consultant Dan Brassil confronts these challenges head on. He discusses how basic principles of linguistics and information retrieval science can be applied to substantially increase the accuracy of the keyword cull while reducing risks and costs.

The CLE covers:

- Classifying culling strategies and understanding their strengths and weaknesses
- Search syntax and common pitfalls
- Using linguistic and information retrieval principals to reduce false positives
- Using linguistic and information retrieval principals to ensure coverage of the key issues

This complimentary CLE is typically provided as an hour long session on site at your location; however, Mr. Brassil will be happy to address audience-specific areas of inquiry on this topic with prior notice that may affect the timing.

Availability is limited. To schedule a session at your company or firm, contact your H5 Practice Director or email us at [insights@h5.com](mailto:insights@h5.com).



**Dan Brassil**  
*Principal Consultant*

Dan Brassil provides expertise in information retrieval, linguistics and solutions design. Since joining H5 in 2005, he has served in key leadership roles on H5 engagements, consulting with clients to identify strategies for capturing relevant subject matter from large document populations and overseeing the implementation of these strategies, ensuring they meet client needs and objectives.

He previously served as an associate director in H5's Professional Services group and was head of research, modelling and analysis. Prior to joining H5, Mr. Brassil taught linguistics at the University of California, San Diego and his work has been published in linguistics and information retrieval journals such as "Artificial Intelligence and the Law" and "Proceedings of the IEEE International Conference on Systems, Man and Cybernetics."

Mr. Brassil received his B.A. with honors from the University of California, Santa Cruz and his M.A. in linguistics from the University of California, San Diego.

## CLE Presentation

### Searching for the Best eDiscovery Practices

The escalation in the use of technology to create and share information is affecting the practice of law. The ABA Model Rule of Professional Responsibility 1.1 (competence) was amended in August 2012 to focus attorneys on the need to stay aware of the risks and benefits of the use of technology.

In litigation, the use of technology for document review continues to be a topic of interest, both to law firms and the courts. How much does a lawyer need to know about the new and evolving tools and how they work? How do you know if they're doing a good enough job, and how do you know what's good enough? Are these tools defensible?

Julie Brickell, H5's Executive Managing Director and General Counsel, has given numerous CLE presentations regarding the evolution of courts' expectations on the use of technology in discovery and on the technology basics.

This presentation, "Searching for the Best eDiscovery Practices," describes how various search methodologies work and how well they work, and considers the ethical implications and legal consequences of using technologies that challenge currently accepted process for finding relevant information.

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**Julia Brickell, Esq.**

*Executive Managing Director and General Counsel*

Julia Brickell is Executive Managing Director and General Counsel of H5. In addition to overseeing the legal affairs of the company, Ms. Brickell advises on corporate strategy, corporate governance and legal compliance issues

Prior to joining H5, Ms. Brickell was associate general counsel of Altria Client Services where she focused on product liability litigation, risk assessment, and electronic data management. From 1998 to 2000, Ms. Brickell served as vice president and deputy general counsel of Philip Morris USA. Before joining Philip Morris, Ms. Brickell practiced at Davis, Polk & Wardwell in New York, where she handled antitrust, securities, professional malpractice, and commercial litigation.

Ms. Brickell is a frequent lecturer on methods of evaluating and addressing the strategic challenges and risks posed to companies by the explosion of electronically stored information. She is on the board of Lawyers for Civil Justice and serves on the faculty of Columbia University's Executive Master of Science in Technology Management program. Ms. Brickell obtained her B.A. from Smith College and her J.D. from Columbia University School of Law.

## CLE Presentation

# Measuring discovery and more: Practical advice and strategies from a leading expert

The increased use of technology for document review has brought with it a fair amount of judicial skepticism that often must be addressed head-on in the courtroom. Judges today expect that attorneys will be able to show both reasonableness of process and proof of “accuracy,” yet there are no clearly defined parameters about what is acceptable for either. That will most likely begin to change this year as the International Organization for Standardization (ISO) moves ahead with developing a standard for e-discovery. Implementation of this standard would confer on counsel an increased responsibility to understand what constitutes reasonableness and “accuracy” in e-discovery.

In this CLE, Dr. Bruce Hedin, H5’s principal scientist and a former coordinator of the TREC Legal Track studies, uses practical examples to show how statistically valid measurement is used in assessing the quality of a production. The CLE covers:

- Designing measurement protocols that will withstand the scrutiny of the opposition and the bench
- Why recall and precision are the standard measures for any document review
- How to use sampling to efficiently and defensibly validate the quality of a document review
- How sampling and measurement protocols can be used to address other practical challenges, such as efficiently demonstrating that the data across a set of backup tapes is duplicative and need not be reviewed or produced.

This complimentary CLE is typically provided as an hour long session on site at your location; however, Dr. Hedin will be happy to address audience-specific areas of inquiry on this topic with prior notice that may affect the timing.

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**Bruce Hedin, Ph.D.**  
*Principal Scientist*

Bruce Hedin is H5's principal scientist. At H5 Dr. Hedin's areas of focus have been process design, sampling, and metrics. His publications include "Domain Analysis and Representation" in *The Handbook for Language Engineers* (2003), and "Searching in all the Wrong Places: The Effectiveness of Search Tools in E-Discovery," *Digital Discovery & e-Evidence* (January 2007). Dr. Hedin is a member the Sedona Conference's Electronic Document Retention and Production Working Group (WG1). In 2007, he was invited to serve as a coordinator for the TREC Legal Track benchmarking initiative under the auspices of the National Institute of Standards and Technology at the United States Department of Commerce and has served in that role since then. Dr. Hedin received a B.A. from Cornell University and a Ph.D. from Stanford University.