



Discovery Decision Checkpoints

Control discovery before it controls your case.

11 QUESTIONS TO ENSURE DEFENSIBLE, EFFICIENT EDISCOVERY

This list of questions is designed to help legal teams pause, evaluate, and make informed discovery decisions that protect their case, their client, and their budget before commitments are locked in.

Developed by Everest Discovery, a security-certified eDiscovery provider trusted by law firms nationwide.

☐ Collection clarity

1

Do we know exactly how this data was collected, by whom, and whether it is forensically sound?

☐ Self-collection risk

2

If the client collected or exported any data themselves, do we know what tools were used and what may have been altered or lost?

☐ Metadata confidence

3

Are we confident that the format in which the data was collected preserves the metadata we may need later? (i.e. timestamps, authorship, file paths, message threading, etc.)

☐ Scope defensibility

4

Can we clearly explain why this data scope is reasonable and proportional?



Unsure if you're on the right track? Send us what you have → info@everestdiscovery.com or call us at 215.325.1800.



Overcollection check

5

Are we collecting data “just in case” that we don’t actually plan to review?



Format tradeoffs

6

Are we accepting a production format because it works – or because it's convenient?



Review readiness

7

Do we have a review workflow that matches the volume, complexity, and risk?



Timeline pressure

8

Are we committing to a deadline before knowing what's inside the data?



Explainability

9

If challenged, could we clearly explain our discovery process end-to-end?



Control check

10

Right now, are we driving discovery decisions — or reacting to them?



Preservation defensibility

11

Have we confirmed that legal hold preservation steps were properly implemented and documented?



If you want a quick sanity check before you take action, send us what you're working with. We'll assess the risks and outline the next steps that serve you and your client's best interests.

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