

RelativityOne Service Definition

Prepared For:

G Cloud 15

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CDS Corporate Overview

Complete Discovery Source (CDS) is a privately held, minority-owned corporation supporting many of the world's leading law firms, corporations, and government agencies. We are recognised as one of the most diverse, flexible, and resource-rich providers in the industry, delivering award-winning solutions built on both proprietary and industry-standard technologies.

Our reputation for creative, client-focused approaches to complex eDisclosure challenges has been earned through consistent, highly successful outcomes. We work in true partnership with our clients, forming a unified team that delivers exceptional responsiveness and meets even the most demanding timelines. The CDS team escalates and resolves issues swiftly and continuously evaluates performance to ensure a seamless, consistent client experience. As a result, clients entrust CDS with their most sensitive, high-stakes, "risk-everything" matters.

At CDS, diversity is a core driver of innovation, creativity, and flexibility; qualities essential to supporting today's legal teams. Our culture is deeply committed to Diversity, Equity, and Inclusion (DEI), promoting equal opportunities and embracing a breadth of perspectives and expertise. This diversity strengthens our client-centric mindset and fuels our can-do approach to solving modern legal challenges.

We partner with leading technology providers, including Relativity, to deliver end-to-end software and services across the full Electronic Discovery Reference Model (EDRM) lifecycle. Our core capabilities include preservation, forensic collection and analysis, processing, document review, analytics, production, and professional services. In addition, our Advisory Services group offers specialised consultation across all phases of the eDisclosure process, helping clients implement defensible strategies that reduce risk, improve compliance, control costs, and drive successful outcomes.

The RelativityOne Solution

RelativityOne is the industry's leading review platform, providing users with the most powerful tools in the market to process, review, investigate and disclose data for any case type. Being a cloud-based solution, RelativityOne is always on the latest version, providing the latest features, fastest review speeds, and unparalleled levels of security, which is why it is the most widely used review platform in the market.

Data Collection, Upload and Processing: The RelativityOne solution is a full end-to-end solution from collection through to production. RelativityOne can be connected directly with Microsoft O365, allowing for the collection of email, Microsoft Teams, OneDrive, and SharePoint data, as well as other non-Microsoft systems such as Slack and Google. Using this solution, data can be pulled directly from Microsoft Azure, and filtered during collection for criteria such as custodial users and date ranges. This reduces the amount of data which would need to be hosted within the review platform reducing your subscription usage.

Data can also be ingested directly into RelativityOne via the web UI with drag and drop processing, allowing quick and simple uploads of smaller data sets. For larger data sets, data can be transferred via the RelativityOne Staging Explorer (ROSE) application. This application

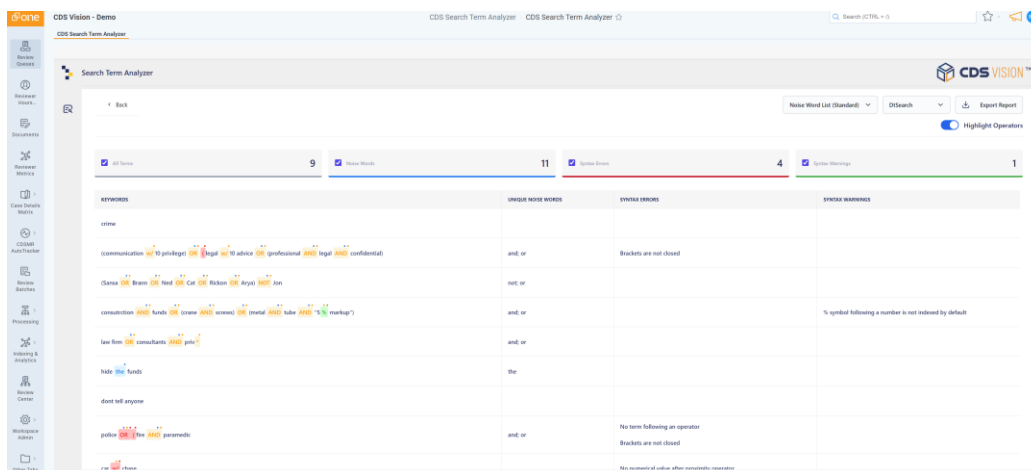
provides unparalleled speeds via Aspera for high volumes of data. No matter which method is used data is encrypted both during transfer to your dedicated storage, and at rest.

On processing, data will be indexed for searching, metadata will be extracted and OCR applied to image files. Relativity OCR can be configured to run for over 120 different languages, and can be used alongside language identification to identify which languages are present within your cases. Automated workflows can also be configured to run as soon as data has completed processing, applying technologies such as document indexing, imaging, email threading, and search term application. Building automations reduces the amount of work required for your team, and increases the speed to access your results, with automated emails letting you know as soon as tasks are complete.

Searching, Filtering and Analytics: Once data is processed, it is ready to be searched and reviewed. Data can be structured and navigated in a number of ways to meet client centric workflows, and RelativityOne extracts over 100 metadata fields which can be used to search and filter data. Metadata fields include common fields such as email senders and recipients, dates, and filenames, as well as more advanced information such as email thread groups, language types, and document concepts. Used in conjunction with CDS proprietary products such as CDS Convert and CDS Vision, data can also be filtered for categories of information, including personal data, potentially privileged communications, junk filters, sensitive term filters, sentiment, and the use of emojis. Using a combination of communication maps, concept clustering, sentiment analysis and sensitive term filters, a clear picture can be built of whom is talking to whom, and what they are talking about.

Using CDS Convert, data can be converted and reviewed from over 35 modern data applications including mobile devices, chat applications, and social media systems. Using CDS Convert over 40 short message metadata fields are created to aid in the searching and visualisation of your data. With an increased shift to short message data types, comes a natural increase in the number of multimedia files types present within data sets, this includes image, audio and video file types. The CDS Vision image gallery was designed to assist in the management of that data, and can be used to identify and code large volumes of images and gifs quickly and effectively, removing the need to review one image at a time

The CDS Search Term Analyzer is also embedded directly within the RelativityOne review platform, and allows our clients to test, adjust and refine their keywords in bulk. This helps to ensure accuracy of search logic, and identify potential errors in syntax, and format. Terms can then be assigned in RelativityOne to provide detailed metrics on search results, including unique hits, and to power keyword highlighting increasing review speeds.



CDS Search Term Analyzer

Data from Europe will often be multi-lingual due to the vast number of languages spoken across the European market. RelativityOne translate utilises Microsoft's translation APIs, ensuring all data is kept within your Azure cloud based environment. RelativityOne translate allows data to be quickly and easily translated as both the text and the native file. This allows for improved review efficiencies, and allows context to be maintained. Using Relativity, data can be translated from more than 100 languages and 12,000 language combinations directly from your RelativityOne workspace, either as a single document as you review, or in bulk without having to manually identify the original language.

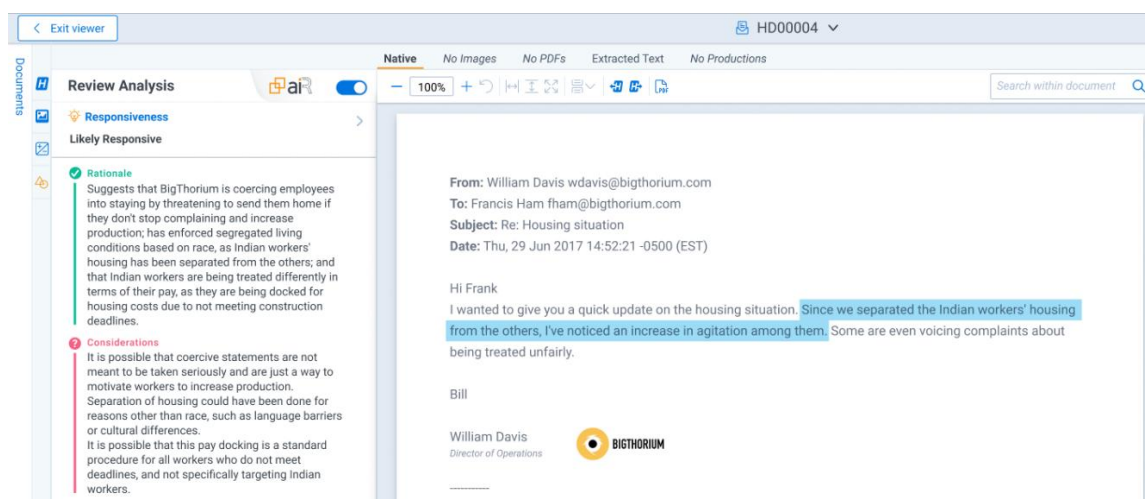
RelativityOne also provides access to machine learning algorithms including TAR 1.0 and TAR 2.0 (CAL) with TAR 1.0 being deprecated in favour of the lower cost, and more accurate TAR 2.0 solution. TAR 2.0 allows reviewers to code documents and have the system learn what is likely relevant, moving this data to the front of the queue, avoiding the need to review irrelevant documents. TAR 2.0 also provides advantages over using keywords for review and investigation, making decisions based on content patterns rather than direct keyword hits. Using TAR 2.0 the system will feed your review team documents as it learns, or investigators can manually identify a key document and allow the system show the documents which are most similar to the one you are interested in. TAR 2.0 can be used both to power a review, or to provide quality control checks of reviewers, identifying where human reviewers may have made mistakes, or missed key data.

TAR 2.0 can also be used in conjunction with CDS's proprietary products, AutoRank, and AutoReport, providing a more simplified approach to document rankings alongside automated reporting each day detailing review progress and accuracy. TAR 2.0 also powers the RelativityOne Review Centre, a new product aimed to simplify the review process, providing detailed real time reporting metrics. To run a review, simply access the Review Centre, click start review and let RelativityOne do the rest. Doing so provides the most likely relevant documents for review, and immediately begins providing detailed metrics on speeds and accuracy.

Generative AI and Innovation: RelativityOne also provides the industry leading generative AI solution which is already available within the platform via Relativity aiR. Unlike other generative

AI solutions available in other products, Relativity aiR does not simply provide a summary of a document, or find documents which may answer a question, but instead reviews large volumes of data for you based on your review protocol. Relativity aiR for review (a solution CDS has been testing for the last 12 months), allows users to engineer prompts to automatically review large data sets, scoring them on a 1 – 4 relevance scale, and providing rationale on why the data was found to be relevant. Simply create a prompt of detailing what you are looking for, and run the prompt over a sample of your data. Analyse the results and adjust the prompt as necessary until you are satisfied with quality of the results. Once satisfied run the prompt over your full data set to automatically review large volumes of data, in turn requiring only a second level review of the relevant information.

Relativity aiR for review can not only cut review times drastically, reviewing tens of thousands of documents per day over the speeds of a human reviewer, but also cut the costs of a human first level review by up to 80%. Relativity is continuing to develop on its generative AI solutions, including Relativity aiR for privilege, aiR for case strategy, document summaries, and an AI search builder to help teams quickly and effectively craft searches for their data, and have generative AI cut costs and time frames in multiple areas.



Relativity aiR for Review

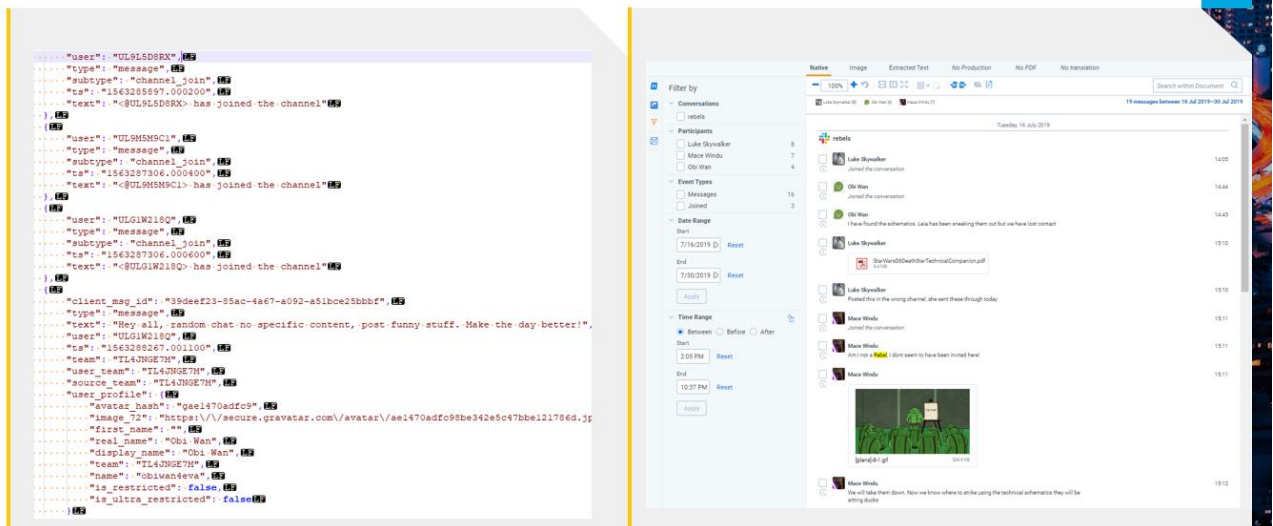
Document Review and Coding: The RelativityOne review platform is innovative, and easy to use with a customisable UI built to simplify the review experience via document lists, filters and custom visualisations created for individual users. The RelativityOne viewer provides extremely fast doc-to-doc loading speeds, allowing 99% of business related documents, audio, video and chat data to be reviewed directly within Relativity with audio\video transcription and searching available in the Relativity viewer. This ensures data from nearly any system is accessible in a single workflow.

Relativity powered by CDS Convert provides the industry leading short message viewer for structured data formats (JSON, XML, JS) extracted from systems such as mobile phones, social media (Facebook, LinkedIn, Instagram), and chat platforms (Teams, Slack) which have been converted to the Relativity Short Message Format (RSMF). This format allows for modern data types such as gifs, reactions, emojis, edited and deleted messages to be displayed, searched

CDS CONVERT

CDS CONVERT

Slack Data with CDS Convert



Slack (JSON) files converted to RSMF via CDS Convert

CDS CONVERT

CDS CONVERT

Coding decisions can also be used with Relativity Fact Manager, a powerful solution to track important information such as key players, entities, dates, and facts. Fact Manager creates outlines referencing the specified facts, and creates offline reports and timelines showing how an issue progressed over time, allowing the documents exported for offline review. Fact Manager will also be integrated with generative AI via Relativity aiR for Case Strategy with advanced access taking place in 2025.

Exporting data from RelativityOne is simple, with various formats available including customisable Excel metadata lists, dashboard and visualisations reports, native files exports and PDF bundles. Used in conjunction with CDS Vision AutoReport, scheduled reports of data can be sent to key stake holders as specified intervals allowing users to be kept up to date with data processing, number of documents, document types, and review progress without needing to log in to the platform. For formal document disclosures the Relativity production module can be used to bates stamp documents, apply placeholders, burn in redactions and add headers and footers to documents. The Relativity production module can meet any formal production obligation, allowing data to be loaded to any review platform via a load file (DAT, CSV, OPT) with natives, images and text.

Security, Access and Regulations: RelativityOne provides the most sophisticated security controls both from early detection and prevention, through to storage. RelativityOne is built for the public cloud and takes advantage of Microsoft's investment in data security.

Azure data centres are compliant with security standards including ISO 27001, ISO 27018, SOC 2, Type II and IRAP attestation, and dozens more industry certifications. CDS' data centres in Europe have been specifically built to comply with UK, EU, and Swiss data privacy and security standards. The facilities address the need to process and host sensitive data in compliance with GDPR, UK GDPR, and Swiss FADP and FINMA regulations and laws.

Access to Relativity can be secured with two factor authentication, which can be provided through multiple methods including auto generated emails, application based tokens, IP address restrictions or Single-Sign-On (SSO). When accessing RelativityOne, role-based access can be provided on an extremely granular level with roles being templated for ease of use, and to avoid potential issues with incorrect permissions being granted. Users can be provided administrative roles with full permissions and access to all cases, down to review based roles who have limited access to specific cases, technologies and features. Once a user has access to a case, documents and fields can be secured to specific groups restricting them completely, or providing them as read only.

First in Relativity

CDS was the first service provider to deliver a fully comprehensive, end-to-end Relativity eDisclosure solution, partnering closely with Relativity to leverage and rigorously test its processing module. Relativity enables users to streamline and customise workflows across legal hold, collection, processing, review, and production, and includes powerful capabilities

such as advanced analytics, Technology Assisted Review (TAR), Generative AI, and structured data conversion.



As a Relativity partner since 2008, CDS has consistently achieved major milestones, from becoming the first Orange-Level Best in Service Relativity Partner and later a RelativityOne Gold Partner, to recently earning the highest number of Relativity competencies of any RelativityOne vendor. We are also a Relativity 2025 Innovation Award winner, recognised for our proprietary technology and thought leadership. These accomplishments reflect our ability to support a large volume of complex matters while delivering exceptional service and deep product expertise. Our team holds every Relativity certification and provides industry-leading knowledge across all aspects of the platform.

CDS Services and Capabilities

CDS provides a comprehensive suite of services across the full EDRM, supported by our industry-leading review platform, proprietary eDisclosure add-ons, and exceptional project management teams. Together, these capabilities help reduce overall costs, minimise risk, improve efficiency, and deliver earlier access to key data. Our experienced professionals offer task-specific support, workflow guidance, technology training, and strategic recommendations to drive the best possible outcomes. Below is a summary of our most utilised services.

Digital Forensics and Data Analysis

The CDS forensics team brings more than 125 years of combined experience in computer forensics and is uniquely equipped to manage data collection, forensic analysis, and expert testimony for even the most sensitive matters, including intellectual property disputes, employee misconduct, and breach-of-contract investigations.

Standard forensics services include:

- Data mapping and assessments
- Data preservation
- Collection and analysis of PC, Mac, mobile device, and external media data
- Server and enterprise application data collection and analysis
- Cloud, social media, and website data collection and analysis
- Forensic imaging, analysis, and expert testimony

Data Processing and ECA Filtering

All collected electronically stored information must be processed, and modern matters often involve hundreds of file types with data volumes increasing exponentially each year. Managing this scale requires a robust, high-efficiency solution capable of performing industry-standard processing tasks, including:

- De-NIST and De-duplication
- Metadata, Text Extraction and OCR
- Native File Processing
- Short Message Data Processing
- Email Threading and Analytics
- Generative AI Integrations

While these processes are standardised and automated to improve efficiency and reduce cost, CDS recognises that each client's needs are unique. A client facing a one-off litigation will require a different approach than an organisation managing large-scale, repeat matters across litigations, investigations, or regulatory events. Early Case Assessment (ECA) workspaces can significantly reduce costs and increase efficiency, particularly when combined with the CDS Corporate Data Warehouse, which provides customised workflows for handling large data volumes. Key benefits include:

- **Master Data Repository:** Reduce hosting costs through a single workspace that enables searching and analytics-driven filtering.
- **Multiple Review Workspaces:** Segregate data for individual matters to improve organisation, security, and review efficiency.
- **Direct Transfer:** Quickly migrate data from the Master Repository to Review Workspaces using Relativity Integration Points, eliminating manual import/export steps.
- **Reduced Data Hosting:** Link back to the Master Repository to leverage a single native dataset across multiple review workspaces.
- **Coding and Redaction Re-use:** Sync privilege, production, and review decisions to the Master Repository to maximise re-use of work product.

Hosting and Proprietary Products

CDS' longstanding partnership with Relativity spans nearly two decades. As the global leader in eDisclosure technology, Relativity underpins our platform of choice, RelativityOne. With Relativity Server scheduled for end-of-life in 2027, CDS has already begun deprecating legacy server-based environments to fully prioritise RelativityOne. This cloud-based platform delivers unmatched speed, scalability, and security, and is continuously updated with new features and applications, including several not available in Relativity Server. These include:

- Relativity aiR Generative AI Suite
 - **aiR for Review:** First Level Review Coding Automation
 - **aiR for Privilege:** Privilege Coding Automation
 - **aiR for Case Strategy:** Interview Questions and Witness Statements
 - **aiR Assist:** RAG based question and answers

- Integrated Machine Translation
- Integrated Audio and Video transcription
- Integrated Excel redaction

Through hosting with CDS, clients also gain access to proprietary RelativityOne applications developed to enhance and streamline review workflows. These innovations combine advanced productivity features with generative AI to support legal teams managing large, complex, and varied matters. Our proprietary enhancements include:

CDS Vision AI Toolkit

CDS proprietary Generative AI capabilities are built directly into RelativityOne, leveraging Microsoft Azure's Generative AI and Natural Language Processing to deliver deeper data insights. Key features include:

- **Document Summarisation:** Create abstractive or extractive summaries of customisable lengths using advanced NLP models.
- **AI OCR:** Enhance OCR accuracy for poor-quality scans and handwritten documents, enabling effective search and review.
- **Personal Data / Entity Extraction:** Identify personal data and key entities to support rapid identification, review, and automated redaction workflows.
- **Object Detection:** Detect objects within images to support searching, filtering, and visual analysis.
- **Image Summarisation:** Generate contextual summaries of image content to improve searchability and understanding.

CDS Convert

CDS Convert is an industry-leading short message conversion solution, originally developed in 2019 alongside Relativity's launch of the Relativity Short Message Format (RSMF). The tool enables the transformation of structured data into fully reviewable formats and provides clients with:

- **Broadest Support:** More than 40 custom-built converters covering mobile devices, social media platforms, financial systems, and ticketing tools, designed for maximum consistency and accuracy.
- **Reporting and Filtering:** Cull and refine data prior to processing to reduce downstream hosting costs.
- **Advanced Analysis:** Automatically extract over 40 metadata fields to enhance searching, analytics, and visualisation.
- **Data Unitization:** Configure conversation splitting by year, month, week, day, message count, or quiet periods to meet case-specific needs.
- **Multiple Export Formats:** Export to RSMF, PDF, JPG, EML, and other supported formats.
- **Dedicated Support:** A full-time development and support team ensuring continuous improvement and expanding compatibility with emerging data sources.

CDS Vision Search Toolkit

A suite of enhancements built into RelativityOne is designed to empower legal teams to improve quality, streamline review, gain deeper data insights, and reduce errors, without needing to rely on seasoned experts. Available enhancements include:

- **CDS Vision:** Pre-configured dashboards that help review teams quickly identify data types, junk content, privileged communications, sensitive information, overall matter intelligence, and review progress.
- **Image Gallery:** Efficiently review large volumes of images using a gallery-style view, supported by mass coding and coding highlights to accelerate visual review.
- **Search Term Analyzer:** Rapidly quality-check search terms for syntax errors, noise words, and formatting issues without requiring expert intervention.
- **Search Excerpts:** Evaluate the effectiveness of search terms by identifying false positives and recurring strings, enabling validation and optimisation of search strategies.
- **Load File Utility:** Quickly assess incoming and outgoing productions for missing fields, metadata template issues, and field naming inconsistencies to ensure accuracy and defensibility.

CDS Vision Automations

CDS Vision Automations enables the automation of key aspects of the eDiscovery process, from analytics application and review to reporting and archiving. With Vision Automations, CDS clients benefit from:

- **AutoTracker:** Visually enhanced tracking of coding decision overturns to validate human review quality and compare against CAL coding decisions.
- **AutoReport:** Streamlined “set-and-forget” reporting that automatically delivers customised dashboards to key stakeholders on scheduled intervals.
- **AutoArchive:** Cost-saving automation for RelativityOne case management, with configurable rules to downgrade workspaces or automate backups.
- **AutoRank:** Active Learning Score Automation providing clear, actionable metrics.
- **Advanced Analytics Visualisation:** Powerful tools to visualise data for faster insight and informed decision-making.

Technology Assisted Review (TAR) and Generative AI

Technology Assisted Review (TAR), particularly through Continuous Active Learning (CAL), has become the industry standard for document review. The CDS Advisory Team consults on hundreds of projects each year, handling cases ranging from tens of thousands to several million documents.

Integrated into the Relativity Review Centre, CAL helps legal teams to:

- Dramatically and defensibly reduce review volume and cost
- Improve review efficiency by prioritising documents most likely to be relevant
- Enhance quality control by identifying documents that may have been coded incorrectly

CAL workflows increase efficiency by promoting the most likely relevant documents to the front of the queue, based on language similarities to previously reviewed documents. Human review is still required to train the model and ensure comprehensive coverage across themes and concepts that differ from previously reviewed content. While the queue updates near-instantaneously, review speed remains dependent on the capacity of the review team, which may need scaling for large matters.

Generative AI (Relativity aiR)

Generative AI takes a complementary approach. Subject Matter Experts provide “prompts” outlining case details and relevance criteria as they would to a human reviewer. The AI then analyses the data to deliver actionable insights via easy-to-understand explainable feedback, helping legal teams manage complex cases, reduce review time, and improve accuracy.

 Requires Attention Very Relevant 		
 Rationale The document contains John Doe's personal information, including his name, personal email address, phone number, and home address, which are considered personal data under UK GDPR. Additionally, it references his employment at ACME Corp, which is directly relevant to the DSAR. These elements make the document highly relevant to the request.	 Considerations The document does not contain any information about John Doe's grievance or other employment-related issues such as appraisals, performance, or training. Additionally, the personal email address mentioned is not relevant as per the review protocol since John Doe would already have access to it.	1. Name: John Doe Page 1 2. Email: figueroajohn@doyle.net Page 1 3. Phone: 960-013-3890 Page 1 4. Address: 79402 Peterson Drives Apt. 511, Davisstad, KS 06196 Page 1
Scoring and Rationale 1 – 4 Scoring, and an outline of why that scoring has been given	Considerations Why that scoring may be incorrect and considerations to make during prompt refinement	Citations Evidence from the document, to ensure no hallucinations.

CDS has been running aiR matters for over two years, participating in Advanced Access Programmes for all aiR products from their inception, in both sandbox and live environments. Our expertise has been recognised through the Relativity aiR for Review competency award, and one of our data scientists, Daniel Diette, has been named a Relativity AI Visionary.

Over the last two years, CDS has observed the following trends when running cases through aiR:

- **Recall:** 90%+ of relevant documents identified
- **Precision:** 70%+ accuracy of relevance decisions
- **Cost Reduction:** 70%–80% lower costs compared to human review
- **Time Reduction:** 80%–90% faster review, handling up to 3 million documents per case, per day

These metrics have been observed across a variety of case types (outlined below), demonstrating the reliability and efficiency of aiR in real-world applications

- 33% Commercial Litigation
- 5% White Collar Crime

- 24% Internal Investigations
- 7% Environmental Litigation
- 7% DSAR Response
- 5% Regulatory Response
- 5% MDL/Mass Tort
- 5% Patent\IP Infringement
- 5% Other
- 3% Employment Disputes
- 3% Construction Disputes
- 3% Government Investigations

Case Study: Accelerated Review and Cost Savings with Relativity aiR for Review

CDS deployed Relativity aiR for Review alongside a team of subject matter experts (SMEs), combining advanced technology with expert oversight to deliver a highly efficient and defensible review workflow. By replacing traditional first-level human review with aiR for Review, the client achieved a significant reduction in time and cost, saving over £10,000 in first-level review.

After culling the dataset through filters and search terms, the review population consisted of 16,781 documents. Following several brief refinement rounds, Relativity aiR for Review was applied to the full dataset. The system completed the review of all 16,781 documents in less than an hour, identifying 3,741 documents as relevant or highly relevant for second-level review.

Working collaboratively with the client, CDS assessed that a traditional first-level human review of the same dataset would have required approximately 415 hours of reviewer time; representing a cost of up to £20,000. By leveraging aiR for Review, the client not only avoided these costs but also benefited from dramatically accelerated timelines, improved consistency, and a more efficient allocation of SME resources.



- **16,781 Documents**
- **4 Hours to code**
- **3,741 Relevant Docs**



*Human Review at 40 docs per hour

Professional Services

Recruiting the best talent is at the heart of CDS' hiring philosophy, fostering a team rich in perspectives, experience, and insight. CDS builds dedicated project management "pods" around our clients, acting as an extension of the law firm or corporation's team. These pods design bespoke workflows tailored to each client's specific needs, ensuring consistent success.

Our team comprises seasoned professionals from law firms, corporations, and service providers, bringing a wealth of expertise to every matter. By combining legal knowledge with best-in-class technology and optimised workflows, we create a collaborative process that efficiently manages projects of any size or complexity.

Each team member has a minimum of five years' experience in eDisclosure, providing clients with informed guidance and practical solutions based on real-world experience. Our professionals operate proactively, prioritising the client experience at every stage and delivering personalised solutions aligned with project requirements.

The CDS Professional Services team holds a broad range of certifications, including Relativity Certified Administrator, Relativity Generative AI Pro, Relativity Certified Trainer, and multiple Relativity Experts and Masters. While certifications reflect foundational knowledge, true expertise comes from hands-on experience with complex, large-scale matters. Our team's thought leadership is recognised through contributions to panels, blogs, educational resources,

and involvement in nearly all Relativity Advanced Access Programmes. This dedication has positioned CDS as a leader in the field, with one of our data scientists, Daniel Diette, recognised as a Relativity AI Visionary.

Advisory and Migration Services

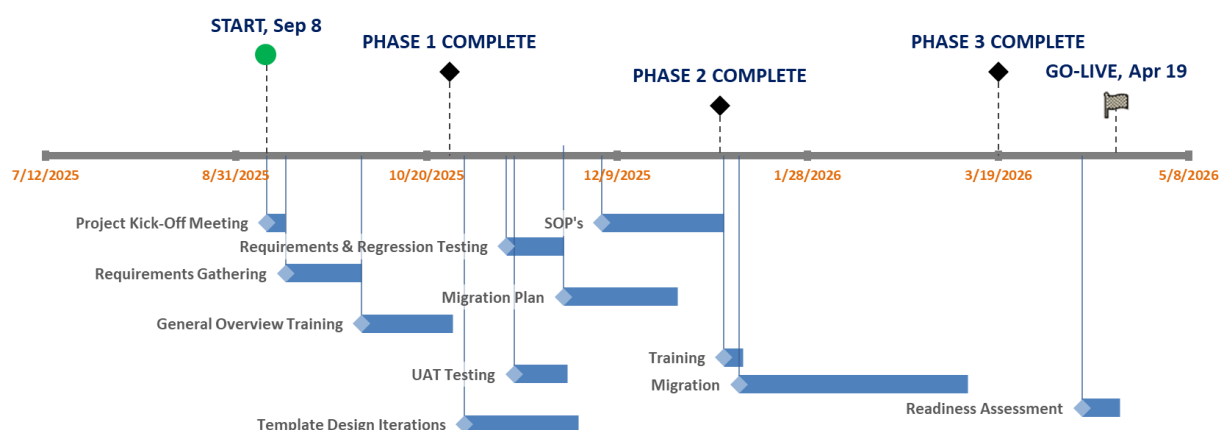
CDS provides expert consulting services as part of its comprehensive client support, specialising in technology-enabled solutions and workflow optimisation. With deep expertise in discovery processes, data management, and technology, our Advisory Services team bridges the legal and technical worlds, delivering innovative approaches to eDisclosure and data management.

Our consultants, comprising former practising lawyers, eDisclosure project managers, data scientists, and forensic specialists, recommend tools and procedures that align with each client's goals and objectives. Whether developing corporate standards, conducting gap analyses, or implementing advanced technology for complex matters, our team applies critical thinking and best practices throughout every engagement, from initial scoping and design through project implementation and training.

The CDS advisory team also includes data migration specialists with decades of experience moving petabytes of data across platforms such as Relativity Server, Nuix, Clearwell, Reveal, DISCO, and OpenText. We have developed proprietary processes, validations, and software to expedite, simplify, and ensure defensible migrations, capabilities recognised through our certified RelativityOne Data Migration competency.

With Relativity Server set to sunset at the end of 2027, CDS is assisting an increasing number of clients with proactive case migrations, ensuring efficient and defensible workflows. Successful migrations require careful planning, which is why CDS has developed a robust scoping and workflow framework aligned to PRINCE2 and ITIL methodologies, incorporating the following key controls:

- **Regular and Structured Communication:** Weekly project calls and daily stand-ups during peak phases to provide real-time updates, quick issue resolution, and alignment across teams
- **Robust Scoping and Goal Setting:** Assess case volumes, activity levels, and priorities to create actionable plans and timelines. Milestones and deliverables are defined collaboratively, with goals tracked against SLAs and KPIs



Implementation Timeline Example

- **Staggered Migrations:** Pre-migrate backend native data, text, indexes, and other information to minimise downtime for large cases
- **Defined Roles and Responsibilities:** Comprehensive RACI matrix ensures all stakeholders understand responsibilities and points of contact, with metrics, tracking, and reporting included across all phases
- **Real-Time Tracking:** Visualisations within Relativity monitor progress, validations, and sign-offs by all parties, ensuring transparency and accountability



Real time Migration Tracker Example

Flexible Storage

RelativityOne offers flexible storage options to optimise the value of your investment (VOI). When subscribing to RelativityOne, an initial data footprint is established, which can be expanded either through subscription growth or ad hoc “burst pricing”; additional storage without a long-term commitment.

To maximise the value of allocated storage, workspaces can be assigned to different states, allowing data to be hosted at full volume (Active Storage) or at reduced volumes with limitations (ECA and Cold Storage). These options enable more data to be hosted within the same storage footprint, optimising subscription limits and cost efficiency.

ECA Storage

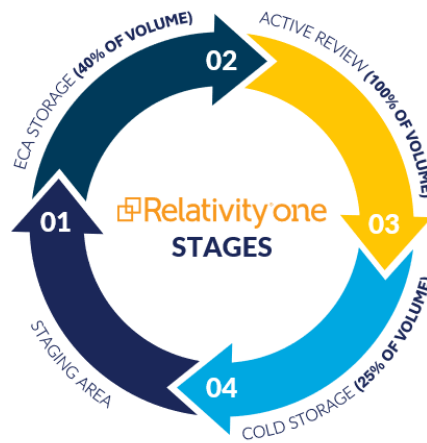
Lower cost environment where data is held for analysis and culling. Visualize data, run analytics and searches to reduce the overall review population prior to review.

Limitations of ECA workspaces include restrictions on the number of concurrent users, documents views, redaction, AI and production.

Staging Area

Storage area for original data for processing, data exports, productions and archived cases.

Archived Cases can be restored to Active storage keeping all tagging, redactions, audit history and documents intact.



Active Review

Main Review workspace with no limitations to conduct review, run AI, apply redactions and produce data.

Charged at a higher rate, documents can be linked to the ECA workspace, to avoid double charges.

Cold Storage

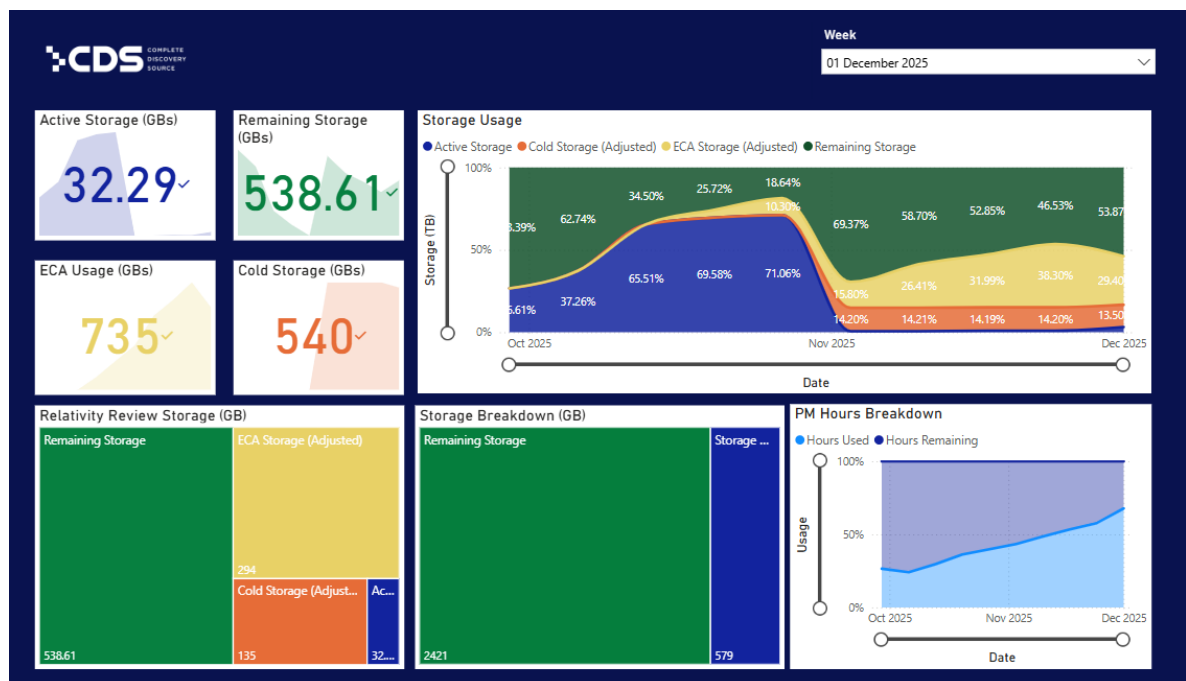
Data can be moved to an offline state where the database can not be viewed, but can be restored in 24 - 72 hours depending on volume.

Moving data to cold storage allows for quick restoration while also reducing hosting volume when cases may be going through periods of inactivity.

Commercial Reporting

Effective data management supports cost reduction and maximises VOI by ensuring data is hosted in the appropriate storage tier. CDS provides tailored usage dashboards built into the platform that track storage consumption and platform utilisation. These dashboards update weekly, with detailed case-level reporting available to key stakeholders at scheduled intervals (weekly or monthly), including:

- Breakdown of data storage and platform consumption
- Monthly and annual invoicing summaries
- Cost forecasting to support budgeting
- Usage trend analysis to monitor potential overages



Your dedicated account manager, together with the Professional Services team, oversees governance, service delivery, and SLA compliance. Regular reviews ensure performance remains within agreed benchmarks and enable proactive identification of issues or optimisation opportunities.

Performance Reporting Cadence:

- **Weekly Operational Check-Ins:** Focused on incident response, open ticket resolution, and user feedback
- **Monthly Strategic Reviews:** Covering SLA compliance, trend analysis, and roadmap alignment
- **Quarterly Business Reviews:** Formal presentation of KPIs, contract health, and service expansion

If reporting metrics or service performance indicate a need for additional support, CDS will scale the delivery team to maintain SLAs and ensure project deliverables are met.

Pricing Scenarios

At CDS, we design bespoke service packages tailored specifically to the unique needs of each client. Through a comprehensive scoping process, we ensure that every package delivers maximum value while avoiding unnecessary costs. Our approach is grounded in providing solutions that are both efficient and cost-effective, ensuring clients receive the precise level of support and technology required for their matters.

Each package is fully adaptable with our goal to deliver a seamless, high-performance solution that maximises operational efficiency, mitigates risk, and provides tangible value throughout the lifecycle of your projects.