

EDRM's CEO Mary Mack Credits Global Community of Contributors and Partners for Company's 14 Year Success



Kaylee Walstad
Chief Strategy Officer

Mary Mack, Esq., CISSP
CEO, Chief Legal Technologist

EDRM

www.edrm.net

Contact:

Kaylee Walstad, Chief Strategy Officer, EDRM

+1-612-804-3244

kaylee@edrm.net

Interview with:

Mary Mack, Esq., CISSP, CEO, Chief Legal Technologist

Conducted by:

Lynn Fosse, Senior Editor, CEOCFO Magazine

CEOCFO: Ms. Mack, the first thing visible on the EDRM site is "Empowering the Global Leaders of eDiscovery." How are you doing so? What is your approach?

Ms. Mack: Our approach at EDRM is multidisciplinary and whole person. By multidisciplinary, what I mean is that it is not just the legal problem, it is not just a technical problem with the general counsel's office and the CIOs staff needing to deal with it. eDiscovery also involves and engages previously siloed stakeholders in security, privacy, information governance, compliance, HR, and the all-important finance: being able to pay for and rationalize eDiscovery. Our multidisciplinary approach and our whole-person approach is around empowering the leaders not only with technical knowledge, with substantive legal knowledge but also with some career-enhancing skills. People need mentoring around being able to moderate a panel, to lead a project in addition to specific eDiscovery skills and knowledge. In this pandemic we have had more opportunities to help round-out and shore up the whole person in eDiscovery.

CEOCFO: Are people looking for a more comprehensive approach and do they recognize they should be?

Ms. Mack: Yes, in the early days of eDiscovery there were not any end-to-end solutions out there. The focus became a best-of-breed and point solutions approach to move data from one format to the other without altering it, to be able to demonstrate that you had not altered it and then being able to hold back data that you could for legal purposes while you produced, numbered and made visible information that had been requested by an opposing party, by the government, by somebody who was able to have the legal right and wherewithal to request documents.

"The biggest surprise was how deep and rich the work is that was done prior to us assuming leadership. The people who have contributed to the EDRM are so incredibly smart and generous and making everything available the way that they did. I think that was probably one of the biggest surprises. The other was the level of people that are involved in it. When I was involved in the early days of the EDRM, it was people in the trenches, hands-on doing the work. That was many years ago and now the same people are in positions of authority and have fabulous careers and they are very involved and we are just so pleased." Mary Mack, Esq., CISSP

Now we are fifteen or twenty years in and the best-of-breed takes more personnel, it is error prone, needing to move things from one best-of-breed program to the next best-of-breed to the next best-of-breed. We are seeing a much more comprehensive approach to eDiscovery than we have ever seen, as there is a high demand for that.

CEOCFO: What led you to purchase EDRM and go from a nonprofit to a for profit business?

Ms. Mack: Our Chief Strategy Officer, Kaylee Walstad and I stepped out of another organization that held the certified eDiscovery specialist designation. As we stepped out, we knew we needed to find something that we could offer that would allow our community to engage and work together. Two weeks after the news broke that we were leaving, Duke University, School of Law, Bolch Judicial Institute reached out to us for an introduction and we talked to them about the EDRM which they currently owned. We found that our hearts were in alignment and the purchase was completed in about two months. You had mentioned the for-profit nature. Originally under the founders of EDRM, it was a for-profit business for over a decade. When Duke/Bolch Judicial Institute took it over they were not-for-profit so EDRM then naturally became a not-for-profit.

We organized as a for-profit structure to allow us maximum flexibility and let me tell you the last few months and every day we are grateful we are able to pivot on a dime, that we are able to make decisions together. It is a wonderful structure not-for-profits have with governing boards. However, we have a different structure. We have a non-governing board, and we get advice from our community, but we are able to make the decisions and move quickly. I think that is why we are able to do well in the face of the pandemic crisis.

CEOCFO: A recent press release announced Pagefreezer as your newest partner. How do you typically work with your partners?

Ms. Mack: [Pagefreezer](#) is an exciting new partner. Pagefreezer is able to archive entire websites for legal and regulatory purposes or just for disaster recovery or because you want to keep another copy. I talked with you about best-of-breed types of solutions; they would be considered a best-of-breed for being able to archive dynamic web content. I would say their brand awareness in the eDiscovery community is very low at entry. In a partnership with EDRM, we are able to enhance their brand in many different ways, everything from webinars to podcasts, press release announcements and a

bigger social media spotlight on their company. We bring to our community all the offerings that Pagefreezer and partners like them have that people may not be aware of.

CEOCFO: *What do you offer clients today? What are the solutions, are there different levels, different time-frames. Would you give us a few examples?*

Ms. Mack: We actually make the list publicly available of who our partners are. We have [thirty partners](#) listed on our site. We have various levels, with our guardian level as our highest level. Guardian partners have quarterly webcasts and coordinated social media campaigns, and a very high level of interaction and service. Our entry level is what we call our Bedrock partner. We have many organizations that are emerging or perhaps they want to try and see how things work as a partner. We have an entry point there and we have a couple of levels in-between. Every one of our levels is customized to what the partner needs to meet their company goals, which is especially important right now. With no in-person events happening, continuing to build awareness in a way that is most meaningful to our partners and those they serve and seek to serve is what is most important.

Partners are able to showcase their technology and their services with a product service showcase. They are also able to demonstrate thought leadership and contribution to the community with substantive educational non-commercial content within. We delineate between the more commercial educational offerings and the pure educational offerings. Another great way to engage is to work on a project. You do not need to be a partner to contribute to a project. There could be a community sourced project, where a company like Pagefreezer, having advanced facility with web-based content, a very problematic data type, if they chose to they could work on a project and contribute things that are non-proprietary to the project and get recognized for it. We publish all that content in creative commons format.

CEOCFO: *EDRM has an international presence. How might your solutions differ from country-to-country, continent-to-continent? Are there special needs or is that part of your customization?*

Ms. Mack: It is part of the customization. We are in 113 countries. eDiscovery is called eDisclosure in some jurisdictions. It is qualitatively different in the sense that in the United States you pretty much can ask for everything that you want and more. Whereas in other jurisdictions like in the UK, for example, you are disclosing rather than having somebody ask and then you produce. There is a little bit of the dance of asking and getting documents which is a little bit different.

The technology and the approaches are very similar in how things get done. There is probably more redaction in the EU because of privacy than there is in the United States because privacy is just beginning to emerge in the legal context. The EU has had privacy baked-in for years. There are many more similarities which is why we can be a global organization and have people speak to each other and understand each other and each other's challenges and opportunities.

CEOCFO: *What surprised in getting to where EDRM is today?*

Ms. Mack: The biggest surprise was how deep and rich the work is that was done prior to us assuming leadership. The people who have contributed to the EDRM are so incredibly smart and generous and making everything available the way that they did. I think that was probably one of the biggest surprises. The other was the level of people that are involved in it. When I was involved in the early days of the EDRM, it was people in the trenches, hands-on doing the work. That was many years ago and now the same people are in positions of authority and have fabulous careers and they are very involved and we are just so pleased.

CEOCFO: *How is business? Are you able to handle a quick ramp-up, if needed?*

Ms. Mack: That was part of the pivoting. We were going to have an in-person conference. Early in the pandemic, the last live event that we went to was the ABA TechShow in Chicago. As we returned from that and the news was coming out about what was happening in China, and they had discovered something in Seattle, we made the difficult decision to pull the plug on the live event early, the in-person event. We are now doing more and more webinars, podcasts, and we have a ZOOM support session that is in its seventeenth week.

At the beginning of the pandemic we started two support sessions. That is part of the whole person that I talked about earlier. The pandemic and the response to it shut down people's family situations and needing to work from home, being forced to work from home instead of choosing to work from home. People and their loved ones getting sick and people losing their jobs. We felt there needed to be a very high level of support. We started out the first twelve weeks with two meetings. There were ZOOM meetings where people were talking about what was going on and whether they needed

support or whether they could give support. That is one of the key ways we are supporting our community. Out of those sessions came something called [EDRM Hub](#). Mostly what people wanted and needed was to be connected to jobs and business opportunities. Instead of the live conference, we invested in the platform that allows job seekers to look, and job posters to post jobs at absolutely no charge. It is a quick way for people to connect in our community and find great candidates and job openings. You can find it at [edrmhub.com](#).

CEOFCO: *What is next for EDRM?*

Ms. Mack: We are coming up on what we call our “summer of substance” which is going to be a webinar series led by our law firm EDRM Project Trustees. We had one on ethics and eDiscovery put on by Reed Smith and we have an upcoming one, on “Practical, Proportional Privacy in Discovery”, which is for right sizing eDiscovery for the importance of the case, and dollars involved. It is around that all-important privacy and proportionality, and that will be presented by Sidley Austin. What is next for us is we are going to continue doing what we have been doing and we are opening to law firm participation on our [global webinar channel](#). I think that is the next exciting thing for EDRM.

CEOFCO: *What might people misunderstand or overlook at EDRM?*

Ms. Mack: We have about two-hundred contributors to [EDRM's projects](#). Previously EDRM was a member based organization and you had to pay to join to participate in projects and things like that. We have since taken that down. I have heard people think you need to join and pay money in order to participate and they absolutely do not.

CEOFCO: *What should people remember about the EDRM story?*

Ms. Mack: Just how grateful both Kaylee and I are for the people and companies that have supported us. We have a global advisory council to die for that has some of the smartest, warmest hearted people on the face of the planet. We feel that everybody has something to offer whether you are new or very experienced, and the newer people can help edit material, they do not need to generate it. The people who have been doing this for many years can do the bulk of the drafting. Everyone is welcome, everyone has something to offer and even the finest legal practitioner partners have something to learn from the person doing the data uploading, for example. We all have something to learn. Learn more about EDRM [here](#).

