



PRODUCT BRIEF

# Venio Legal Hold

Modernizing Legal Hold for a Connected, Data-Driven World

## Key Benefits

### Provides Accurate, Reliable, and Defensible Legal Hold Process

- Simplifies error-prone process
- Maintains attention to detail
- Meets critical deadlines

### Streamlines Workflow and Controls Spend

- Saves hours of manual work
- Covers the entire legal hold process
- Keeps you up to date on progress

### Delivers Future-Proof Investment

- Scales to any number of cases or holds
- Bridges to full end-to-end eDiscovery
- Available as SaaS or on-premise

## Venio Legal Hold: Built for Reliability, Designed for Defensibility

Managing modern legal holds isn't what it used to be. Today's matters often involve hundreds of custodians, petabytes of data, and a maze of sources - from Microsoft Teams and Slack to Zoom, Twitter, and even handwritten notes. Add to that the challenge of custodians who have left the organization, and it's clear: traditional methods like spreadsheets, emails, and outdated tools simply can't keep up. They're slow, error-prone, and difficult to defend.

Venio Legal Hold changes that.

Built for Litigation Directors, Paralegals, and IT Managers, it brings automation, reliability, and clarity to the entire legal hold process. From notifications and alerts to reminders and custodian management, every task is streamlined and tracked with precision.

With out-of-the-box integration for modern data sources - including Microsoft Teams, Slack, Facebook, Twitter, and Zoom - Venio ensures your holds stay consistent, compliant, and defensible. And because it's built on Venio's AI-driven platform and unified data layer, it integrates seamlessly with our end-to-end eDiscovery suite, available both as SaaS or on-premise.

Venio Legal Hold isn't just another tool, it's the smarter way to take control of your legal hold obligations.

## Key Features

### Microsoft Teams and Slack Support

As modern enterprises embrace automation and BYOD policies, critical case data increasingly lives within cloud, chat, and collaboration tools. From Microsoft Teams and Slack to Facebook Messenger, Zoom, Twitter, and Cellebrite, key information is scattered across multiple channels.

Venio Legal Hold ensures nothing falls through the cracks. It provides full capability to preserve and process complex, diverse data sources, giving legal teams complete control over every byte of potentially relevant information, no matter where it resides.

## Automated Notifications and Reminders

Managing communication with dozens or even hundreds of custodians can be tedious and error-prone. Venio Legal Hold removes that burden through automated, intelligent notifications sent at every stage of the hold process.

From the initial notice to periodic reminders and eventual closure, messages are sent on a set schedule. If a custodian fails to respond, Venio automatically follows up frequently enough to prompt action, but not so often that it overwhelms inboxes.

## Notification Templates

Drafting individual communications for each case and custodian is not only time-consuming but also introduces risk. Venio Legal Hold simplifies this with customizable templates for every stage of the hold lifecycle.

These templates ensure that critical details are always communicated clearly and accurately. With built-in options for reminders, attachments, and questionnaire requests, teams can maintain consistency while saving hours of manual effort.

## Custodian Management

Effective custodian management is the backbone of a defensible legal hold process. Venio makes it effortless to add, remove, edit, or update custodians, keeping every record current.

Custodians can securely respond to questionnaires, review attached materials, and acknowledge notifications through easy-to-use templates. Every interaction is automatically tracked and recorded, ensuring transparency and compliance throughout the process.

## Status Updates and Reports

Every action in Venio Legal Hold is captured in real time, from initial notices to acknowledgments, follow-ups, and closure. These comprehensive reports and status updates allow teams to maintain total control and visibility across all custodians.

With defensible documentation at every step, legal teams can confidently demonstrate compliance and mitigate the risk of court sanctions or missed obligations.

## Dashboard

Clarity and control start with visibility. The Venio Legal Hold Dashboard delivers both, offering a functional and intuitive interface for legal administrators.

At a glance, users can track total hold counts, pending issues, and custodian acknowledgments. With just a few clicks, they can drill down into individual custodian statuses, identify bottlenecks, and take immediate action, all within a single, unified view.

The screenshot shows the Venio Legal Hold dashboard. At the top, there are four summary cards: 'Holds notice not sent' (1), 'Hold notice sent' (3), 'Total Custodians' (19), and 'Total Hold Count' (4). Below these is a table titled 'Create Hold' with columns for 'Attorney Name', 'Client Matt...', 'Legal Hold ...', 'Legal Hold ...', 'Follow Up ...', 'Legal Hold ...', 'Transfer To...', 'Hold Issued', 'Document ...', 'Description', and 'Action'. The table lists five rows of data, each with a 'Create Hold' button and a trash icon in the 'Action' column.

Create Hold	Attorney Name	Client Matt...	Legal Hold ...	Legal Hold ...	Follow Up ...	Legal Hold ...	Transfer To...	Hold Issued	Document ...	Description	Action
<button>Create Hold</button>	Nathan Ries Test	NR-TEST-0...	nathanael.r...	02/07/2025	02/14/2025	Open	No	No	02/14/2025	Test	<span>trash</span>
<button>Create Hold</button>	Testing Demo	12345	Tonya Mulli...	02/06/2025		Open	No	No			<span>trash</span>
<button>Create Hold</button>	I2345	4455667	Tonya M	02/20/2025	02/27/2025	Open	No	No			<span>trash</span>
<button>Create Hold</button>	Tonya	1238985045	Tonya			Open	No	No			<span>trash</span>

## Flexible Deployment Options

No two organizations are the same, and neither are their IT environments. Venio Legal Hold offers flexible deployment models to fit your technical and compliance needs, whether on-premise, SaaS, or hybrid cloud.

This flexibility ensures your team can scale confidently while maintaining full control over security, access, and data governance.

## Option to Upgrade to End-to-End eDiscovery

Venio Legal Hold doesn't stop at preservation, it's designed to grow with you. If your current tools don't handle eDiscovery end-to-end, upgrading is simple.

Built on the Venio Integrated eDiscovery Platform, Legal Hold transitions seamlessly into full-scale discovery, maintaining a consistent, intuitive interface. Your investment today becomes the foundation for a unified, long-term eDiscovery solution.