

**Liberty Mutual Insurance**

**Industry**

- Insurance

**Solution**

- OpenText™ EnCase™ Information Assurance

**Services**

- OpenText Professional Services

**Results**



**Standardized processes** with consistent, defensible data collection and preservation



**Reduced costs** with targeted and automated workflows leveraging internal expertise



**Scaled across a massive litigation portfolio** to meet high volume data footprint



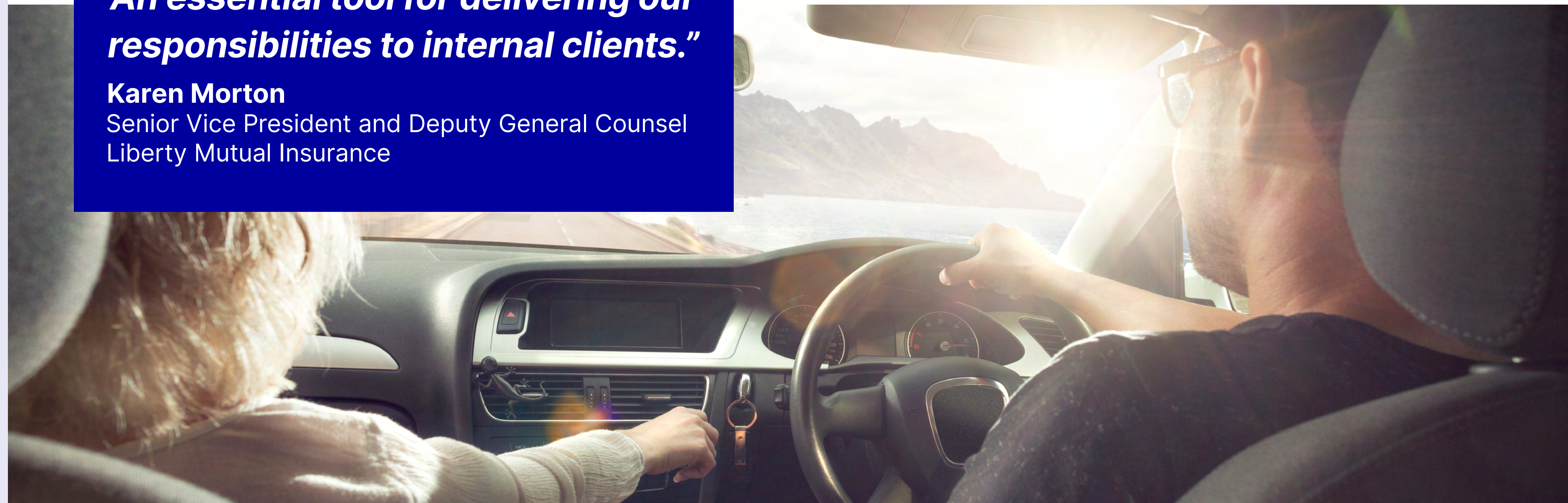
# Liberty Mutual Insurance controls legal risk and cost with in-house forensic collection technology

**OpenText EnCase Information Assurance (Formerly EnCase eDiscovery) enables global insurer to efficiently and confidently manage data collection and legal preservation processes in-house**

***“An essential tool for delivering our responsibilities to internal clients.”***

**Karen Morton**

Senior Vice President and Deputy General Counsel  
Liberty Mutual Insurance







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**Liberty Mutual Insurance offers a wide range of insurance products and employs 50,000 people in 800 offices across 30 countries. Founded in 1912, it ranks as the third largest property and casualty insurer in the United States and 68th on the Fortune 100 list of largest corporations in the U.S. based on 2017 financials. As one of the largest insurers in the US, Liberty Mutual is routinely involved in litigation and regularly handles millions of legal documents. To efficiently and defensibly collect and process all this data, Liberty Mutual has invested in people and technology to bring these core functions inhouse—dramatically cutting costs while gaining a competitive edge.**

### **In-sourcing legal processes for better outcomes**

Like other global enterprises, Liberty Mutual Insurance is no stranger to high volume, from new client onboarding and claim services to data collection and litigation coverage. In an average year, the Liberty Mutual legal team and eDiscovery group manage thousands of litigation, compliance, and investigation matters involving data from tens of thousands of custodians. For each matter, data must be collected from a variety of sources, preserved, and handed off for review in a forensically-sound manner with absolute confidence in data integrity.

Previously, the global insurer relied on various vendors and outside counsel to help manage collections and eDiscovery projects. But constantly engaging third-parties produced inconsistencies, delays, and high costs. On top of that, transactional collections were exceedingly complex given the breadth of data and the geographic distribution of key sources around the world. To address these challenges, the team brought forensic collection technology in-house, enabling them to standardize their process across matters, leverage their institutional knowledge, and grow operational efficiencies – all while cutting third-party costs.

***“Having a repeatable, defensible process when you have the volume of matters that we are looking at, as well as cost, it just makes sense,”*** explained Karen Morton, Senior Vice President and Deputy General Counsel for Liberty Mutual. ***“It’s in everyone’s best interest to try to address all of those issues if you are going to remain competitive.”***

### **Selecting the right technology for the job**

For close to a decade, Liberty Mutual has relied on OpenText EnCase Information Assurance for defensible data collection across their ecosystem of electronic data sources. In evaluating solutions, the team looked for technology that enabled network-based collections, scaled to handle high volumes, and stretched across different office locations with variable bandwidth. They needed a tool that could collect specific files or point to a directory to automate collections, with the option to collect full drives whenever needed. And, to better understand the scope of potential litigation, Liberty Mutual professionals required analytics and investigative capabilities as early as possible. Finally, any tool Liberty Mutual used had to be the gold standard for defensibility—ensuring a repeatable, forensically-sound collection workflow that could withstand legal challenges.

Only OpenText EnCase Information Assurance met all of Liberty Mutual’s needs. As EnCase is the most widely-used and judicially-approved data collection tool, there was no doubt about maintaining evidence integrity. The lightweight EnCase agent could be deployed on thousands of employee workstations to confidently and discreetly collect evidence from endpoints across offices and networks. Complemented by robust connectors to e-mail platforms and content repositories on-premise or in the cloud, EnCase targets and preserves potentially relevant unstructured data regardless of source.

***“We really feel like we couldn’t exist without a tool like this.”***

**Brian Morrison**  
Principal eDiscovery Analyst,  
Legal - eDiscovery Group  
Liberty Mutual Insurance







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Automation and repeatability were key drivers for Liberty Mutual, as a standardized process ensures that data is collected the same way each time, defensibly. EnCase Information Assurance provided Liberty Mutual the ability to point a predefined, standard criteria at a device name, IP address, file share, or Microsoft Exchange and reliably collect the potentially relevant data from that source. **“Across the board, we’re doing the same thing for each person, each collection, each matter,”** related Brian Morrison, principal eDiscovery analyst for the insurance provider’s Legal eDiscovery Group. **“It also helps us with our response time. If you’re having to engage a vendor every time, it’s a lot quicker for us to just have the ability.”**

### Developing a trusted partnership

Morrison and the rest of the eDiscovery team interact regularly with OpenText Professional Services to ask questions, build in-house expertise, and manage upgrades. Furthermore, OpenText’s EnCE™ and EnCEP™ certifications ensure Liberty Mutual employees are recognized as skilled examiners with a mastery of computer investigation methodology.

EnCase Information Assurance has supported Liberty Mutual’s data collection even as requirements more than tripled initial volume estimates. Its profiles for directing work without human intervention speed collection, allowing Liberty Mutual employees to more efficiently focus their efforts. **“The need grows to meet the capability,”** related Morrison. **“EnCase handled the scale... it’s the tool we’ve grown up around and it really meets our needs. We really feel like we couldn’t exist without a tool like this.”**

With other OpenText solutions implemented across the enterprise, Liberty Mutual stands to benefit from integration among the leading forensic and content management technologies. Optimized connectors with existing content management platforms like Documentum help Liberty Mutual access data in a timely and streamlined fashion to meet expectations. **“Continuation of the ongoing partnership that we’ve enjoyed with OpenText is a big plus in our eyes.”** said Morton.



### About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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