

# Unlock the Future of eDiscovery with AI: Essential Skills, Jobs, and the Latest in Relativity

Thursday, November 7, 2024



# Meet the Experts



**Jared Coseglia**

CEO & Founder,  
TRU Staffing Partners



**Danielle Urban**

Senior Manager Certification,  
Relativity



**Parker Strubhar**

Senior Certification Specialist,  
Relativity



# Main Insights

- Assess your current AI skill set, identifying both strengths and areas for growth.
- Begin to effectively communicate your AI expertise (or pursuit of expertise) within the Relativity ecosystem.
- Understand where AI skills will be tested for certification within the Relativity ecosystem.
- Identify high-demand AI skills to pursue for future opportunities that give you vertical and financial mobility.



# AI in Relativity



# AI in Relativity

## A brief history

Relativity has been heavy on Machine Learning and NLP (natural language processing) in the past.

– **2008:** Conceptual Analytics

- Relativity integrates Content Analyst into Relativity Analytics.
- Clustering could group documents into conceptually similar groups.

– **2010:** Technology-assisted review (TAR) begins to outperform manual review, reducing effort/costs.

- Use sample-coded documents to train the system to accurately predict coding for remaining docs.
- Review results, update model or index, repeat.

– **2012:** Relativity Assisted Review (RAR) launches

- Da Silva Moore rules that TAR was an acceptable way to product documents.

– **2013:** Structured Analytics

- Email threading and near-dupe detection.
- Used pattern matchers and parsing to understand complex email chains.

# AI in Relativity

## A brief history - continued

- **2017:** Relativity replaced RAR with Active Learning
  - Attorney codes docs, AL classifies docs based on attorney decisions, serves up most relevant docs first. Attorney codes those docs, which provides feedback to the AI model so it can learn. Review continues and results are validated to confirm accuracy and completeness.
- **2019:** Name Normalization and Communication Analysis
- **2022:** Review Center + Sentiment Analysis, integration of TextIQ products
  - ChatGPT was released
- **2023:**
  - GPT-4 passed the Uniform Bar Exam
  - Relativity aiR suite: Relativity now leverages LLMs/Generative AI.

# Active Learning, Review Center, and Relativity aiR

- **Active Learning**

- Reviewer codes at least 5 positive and negative documents, creating training examples. The classifier then places all documents into one of two groups by determining if it belongs to a given class

- **Review Center**

- AI-powered review built off any saved search, with more performant integrated learning classifier and built-in validation workflows
- Reactive, collective analysis of each reviewed document

- **aiR for Review**

- Proactively identifies important documents based on individual document analysis
- Uses case protocols and other contextual information in its analysis
- Makes clear predictions based on prompt criteria and built-in training

- **By end of 2024**

- Active Learning functionality is transitioning to Review Center and Active Learning application will become read-only.
- All relevant exams will have Active Learning removed and will test on Review Center only.

Spend 50% less time setting up projects in Review Center when compared to Active Learning

# aiR for Review & aiR for Privilege

## aiR for Review

- Uses generative AI to analyze documents, predict responsive documents, locate specific legal issues, and pinpoint key documents at the start of a case.
  - Analysis is powered by Azure OpenAI's GPT-4 Omni LLM
- Explains the rationale behind its decisions by providing excerpts from identified documents.
- Provides consistent recommendations to reduce coding discrepancies compared to traditional document review.
- All jobs are securely transmitted through Azure OpenAI Service and no customer data is retained.
- Delivers more efficient, consistent, and higher-quality document review.

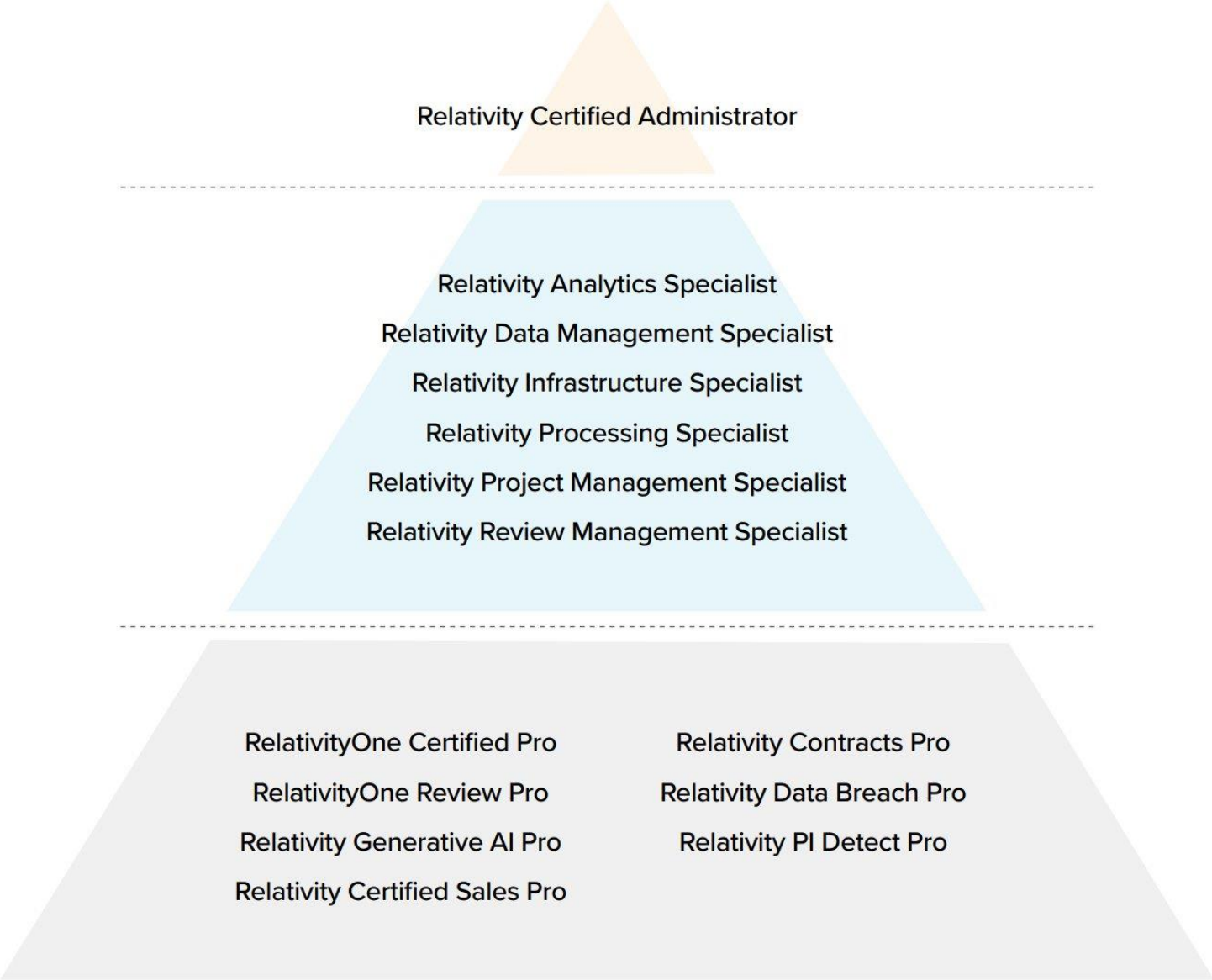
## aiR for Privilege

- Analyzes documents to identify them as privileged during a first-pass privilege review
- The AI learns across matters to build up its knowledge over time, resulting in consistent results.

# Generative AI Pro Exam



# Relativity Certifications



# Relativity Generative AI Pro Exam

Pro exams are **introductory** exams that aim to help you understand the product, its benefits, and the use cases.

No prior knowledge or experience is needed with generative AI to take the exam.

- When studying for the exam, you will learn:
  - Relativity's approach to building ethical and secure AI-powered problem-solving tools
  - An overview of the aiR suite of products
  - Foundational generative AI concepts and terminology



# Relativity Certification Suite



Exams currently testing on Machine Learning/NLP/Generative AI:

- **Admin Exam:**
  - Relativity Certified Administrator
- **Specialist Exams:**
  - Relativity Analytics Specialist
  - Relativity Review Management Specialist (Review Center in Q4)
  - Relativity Project Management Specialist (Review Center in Q4)
- **Pro Exams:**
  - Relativity Generative AI Pro
  - Relativity Data Breach Response Pro
  - Relativity Contracts Pro
  - RelativityOne Review Pro
  - RelativityOne Certified Pro

# TRU's Takeaways From Relativity Fest



# Top 3 Takeaways From Relativity Fest 2024

01

**In 2025, people will be using aiR for Review for first pass review in a more meaningful way than years past.**



While hiring managers aren't requesting aiR for Review/GenAI experience from the ESI professionals they are currently hiring, they are training their existing staff to develop those exact skillsets and 6 to 12 months from now attrition of those trained in aiR for Review/GenAI will lead to a desired skillset that matches.

02

**Law firms are and will be hiring more talent than in years past because of adoption of RelativityOne.**



In 2024 for the first time in 10 years, TRU tracked more jobs accepted at law firms than at service providers. This is largely due to the expansive adoption of RelOne and law firms beginning to increasingly internalize insourcing discovery work.

03

**Role definition and skill adjustments are needed for the future state of the eDiscovery talent ecosystem.**



The skills and role definitions are evolving as we speak and if you aren't learning new skills right now, someone else is who you will compete with for work in 2026.

# TRU's Relativity Skills Self-Assessment



# Problem

Relativity adoption surges. Relativity certification ecosystem earns instant credibility from hiring managers, but not every job seeker has Relativity certifications.

Hiring managers needed more nuanced and enriched information about job seekers' Relativity technology proficiencies before the interview process.

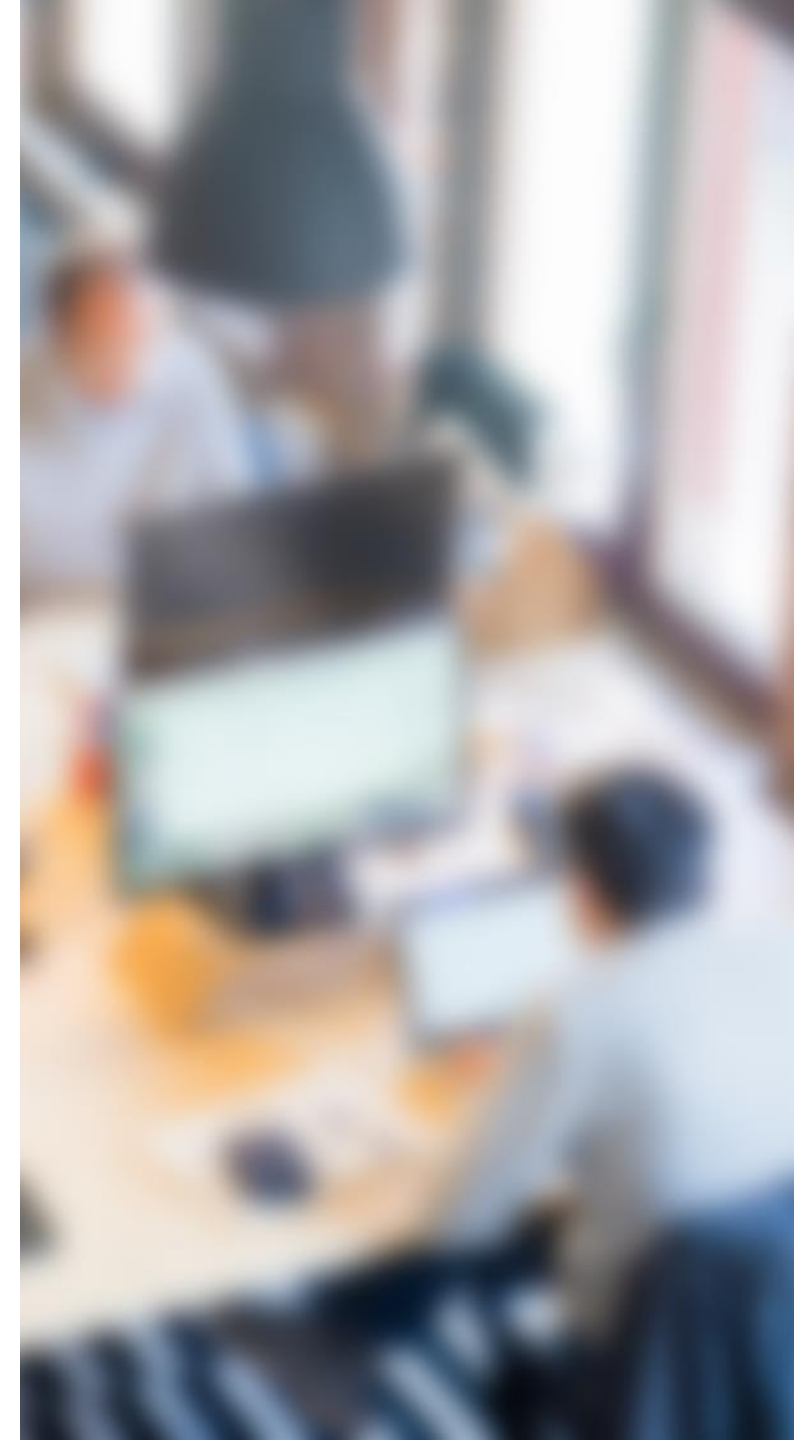
Job seekers aren't sure how to articulate Relativity knowledge on their resume or during an interview.

# Solution

TRU Staffing Partners and Relativity collaborate in 2016 to create a self-assessment.

The self-assessment allows hiring managers to understand the job seeker's level of confidence within Relativity.

Job seekers can articulate their level of confidence per skillset in a comprehensive way with a document that accompanies their resume.



## Problem

Relativity adoption surges.  
Relativity certification  
ecosystem earns instant

## Solution

TRU Staffing Partners and  
Relativity collaborate in 2016  
to create a self-assessment

TRU's received **4,000+**  
applicants with completed  
self-assessments over the  
past 5 years

Job seekers aren't sure how to  
articulate Relativity  
knowledge on their resume or  
during an interview.

Skills set in a comprehensive  
way with a document that  
accompanies their resume.

# Current TRU Relativity Self- Assessment

In the next section, please rate yourself based on the levels described.

- **No experience** = have not used this feature in Relativity
- **Skilled** = have familiarity with feature, may or may not use regularly
- **Advanced** = regularly use this feature and receive accurate results
- **Expert** = have mastery of this featured based on frequency, results, and experience

Please rate your Relativity experience in the following areas:

## ANALYTICS

	No Experience	Some Experience	Advanced	Expert
Using Analytics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designing and using Conceptual Analytics workflows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designing and using Structured Analytics workflows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using Review Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## APPLICATIONS

	No Experience	Some Experience	Advanced	Expert
Using Legal Hold	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using Relativity Integration Points	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# TRU's Relativity Skills Assessment Client Output



## Relativity Self-Assessment

### ANALYTICS

	No Experience	Some Experience	Advanced	Expert
Using Analytics	-	-	-	✓
Designing and using Conceptual Analytics workflows	-	-	-	✓
Designing and using Structured Analytics workflows	-	-	-	✓
Using Review Center	-	-	✓	-

### APPLICATIONS

	No Experience	Some Experience	Advanced	Expert
Using Legal Hold	-	✓	-	-
Using Relativity Integration Points	-	-	✓	-
Using early case assessment	-	-	-	✓
Using aiR for Review	-	✓	-	-
Using Import/Export	-	-	✓	-
Using Personal Information Detect	-	✓	-	-
Using Data Breach Response	-	✓	-	-
Using Contracts	-	-	✓	-

### REVIEW

	No Experience	Some Experience	Advanced	Expert
Configuring and using Review workflows	-	-	-	✓

# 90%

of TRU customers who are hiring for talent with Relativity skills request accompaniment of this checklist with a resume at point of submission. (Over 200 law firms and vendors)



## Relativity Self-Assessment

### ANALYTICS

	No Experience	Some Experience	Advanced	Expert
Using Analytics	-	-	-	✓
Designing and using Conceptual Analytics workflows	-	-	-	✓
Designing and using Structured Analytics workflows	-	-	-	✓
Using Review Center	-	-	✓	-

### APPLICATIONS

	No Experience	Some Experience	Advanced	Expert
Using Legal Hold	-	✓	-	-
Using Relativity Integration Points	-	-	✓	-
Using early case assessment	-	-	-	✓
Using aiR for Review	-	✓	-	-
Using Import/Export	-	-	✓	-
Using Personal Information Detect	-	✓	-	-
Using Data Breach Response	-	✓	-	-
Using Contracts	-	-	✓	-

### REVIEW

	No Experience	Some Experience	Advanced	Expert
Configuring and using Review workflows	-	-	-	✓

Main Areas  
of Interest  
Resulting  
From our  
Analysis

## Critical Trends

**Analytics**

**Review**

**RelativityOne**

**Processing**



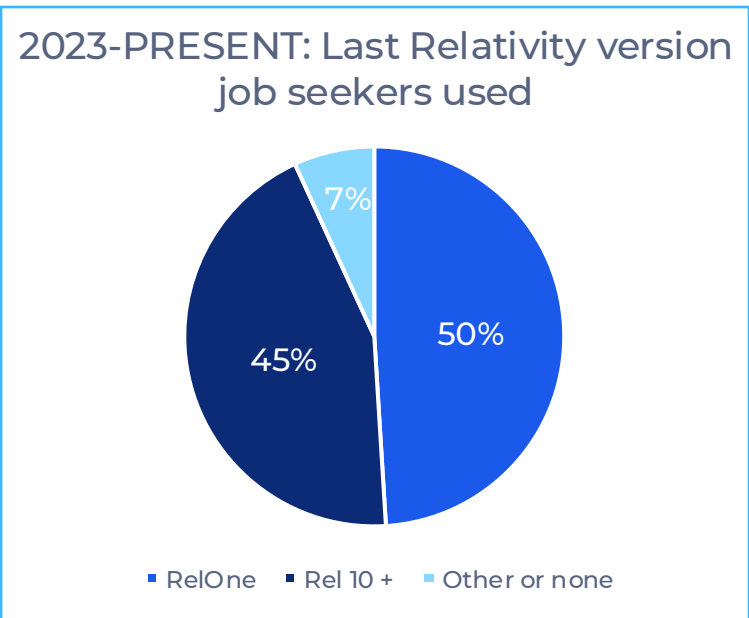
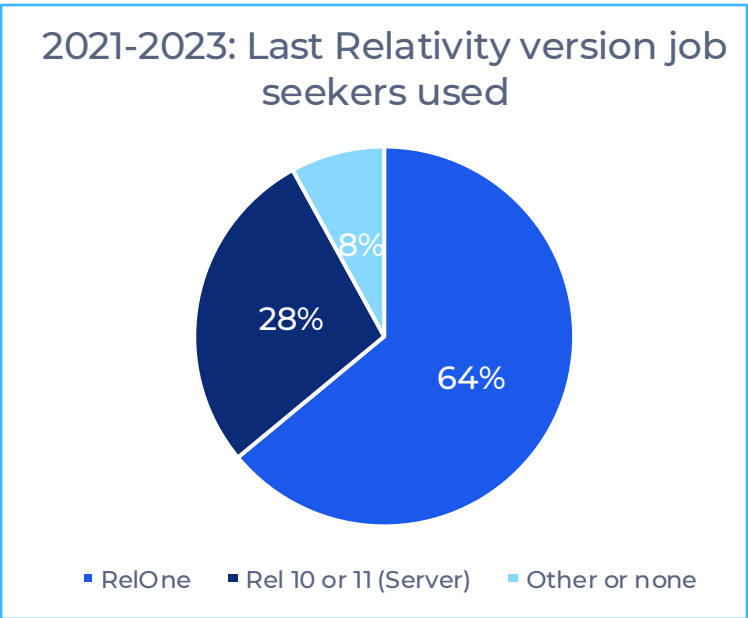
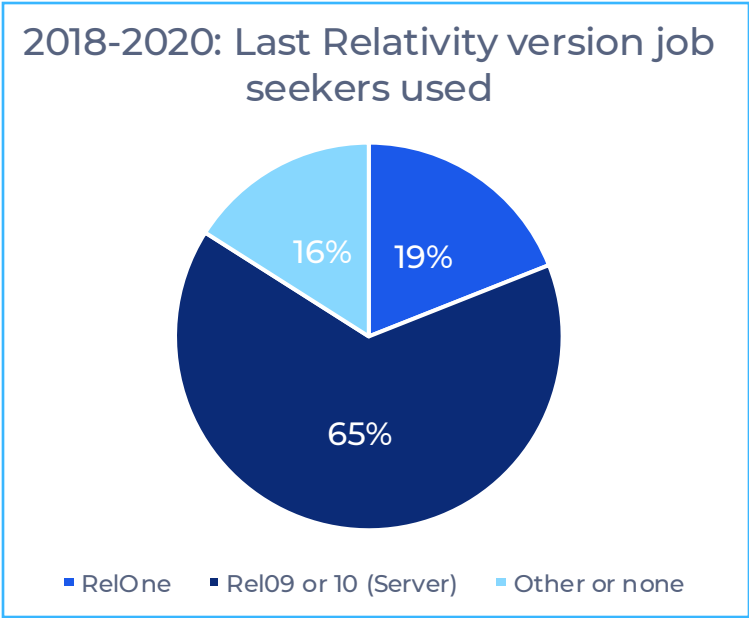
 Relativity®

# Relativity's Impact on the Job Market



# RelativityOne Job Seeker Adoption 2018-Present

In 2018 to 2020, only **19%** were using RelativityOne. From 2021 to 2023, **64%** are using RelativityOne.



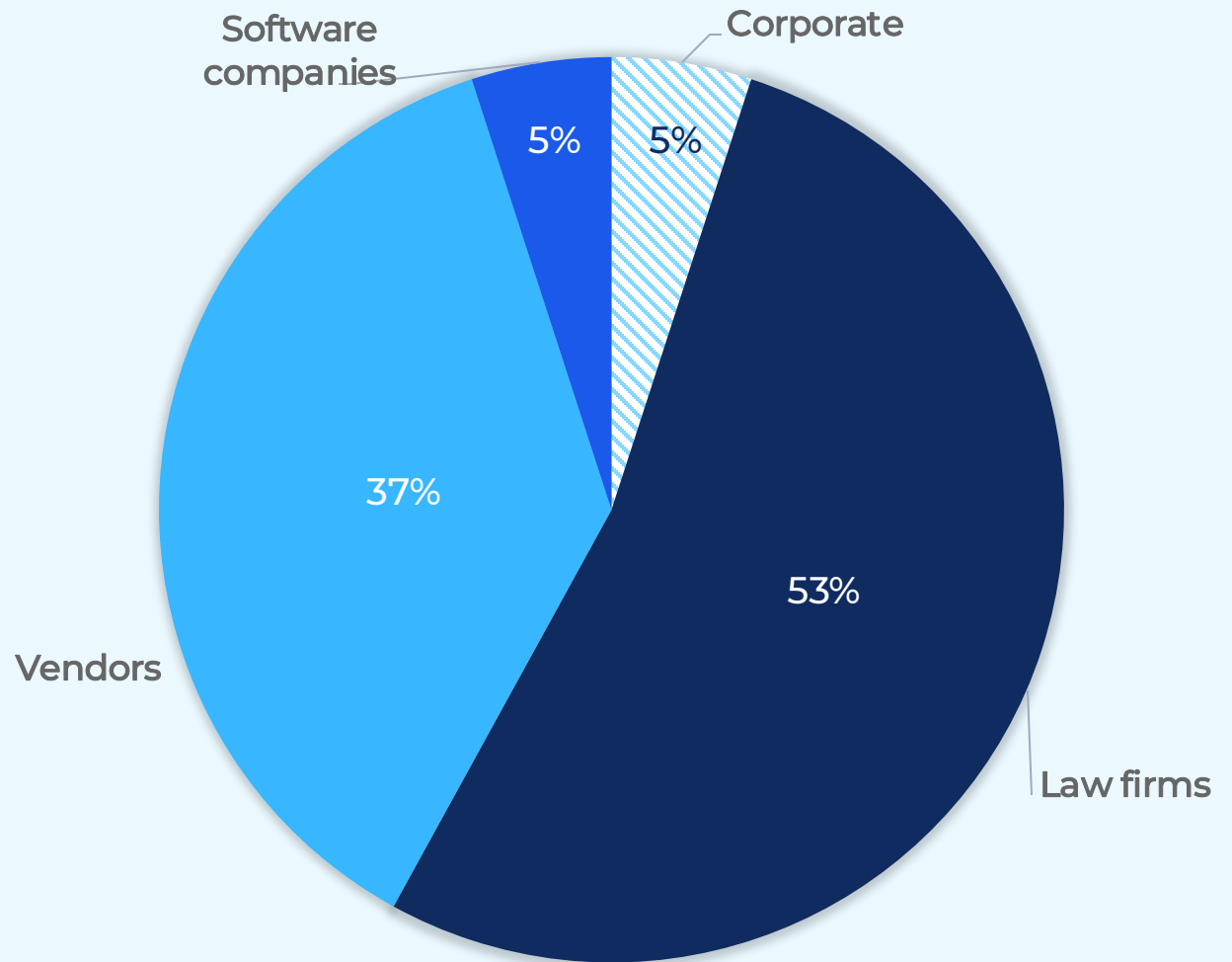
What version are job seekers using the most?

# RelOne's Impact on Hiring Trends in 2024



Relativity®

## ORGANIZATIONAL BREAKDOWN



(2024 YTD)

# Relativity Review Job Seeker Skill Trends

REVIEW Question Breakdown:	No Experience %	Some Experience %	Advanced %	Expert %
Configuring and using Review workflows	10%	28%	30%	32%
Creating custom workflows using fields, choices, layouts, views, and dashboards	7%	18%	28%	47%
Creating and managing batches	8%	20%	26%	46%
Using Relativity Event Handler Express	26%	30%	23%	20%
Running scripts	18%	25%	27%	31%
Creating and using persistent highlight sets	10%	19%	25%	47%
Creating markup sets	13%	21%	25%	41%
Using RelativityOne Redact	29%	27%	23%	21%
Using the Relativity Short Message Viewer	25%	36%	23%	16%
Creating Relativity Dynamic Objects	34%	35%	19%	12%
Using Automated Workflows	26%	36%	24%	14%
Creating and running reports: Dashboards, Pivots, STR, Audit, sampling	12%	23%	30%	36%
Managing queues	23%	29%	27%	21%
Using Case Dynamics	43%	35%	15%	7%
Importing and supporting Transcripts	38%	34%	19%	9%
<b>Total</b>	<b>20%</b>	<b>27%</b>	<b>25%</b>	<b>28%</b>

# Relativity Advanced Analytics Job Seeker Skill Trends

ANALYTICS Question Breakdown:	No Experience %	Advanced %	Expert %
Using Analytics	14%	24%	12%
Designing and using Conceptual Analytics workflows	11%	9%	5%
Designing and using Structured Analytics workflows	9%	10%	6%
Using Review Center	30%	16%	7%

aiR Question Breakdown:	No Experience	Some Experience	Advanced	Expert
Using aiR for Review	68%	24%	7%	2%

# Guidance for Hiring Managers and Job Seekers



# Hiring Managers

Build retention plans around current staff using GenAI technology

Categorize GenAI billable hours and bill at a premium

Begin formalizing your interview Q&A around GenAI skillset investigation

Outline GenAI knowledge succession planning to scale utilization

# Job Seekers

Aggregate aiR/Rel GenAI skillsets for future vertical and financial mobility

Highlight tasks and/or employer expectations on your resume that are related to GenAI and LLM training

Prepare your interview narrative around GenAI perspective and experience

Identify “white knight” stakeholders who can serve as mentors on GenAI

Where can Relativity users expect to be tested on or validate skillsets for aiR products in the future?



Coming in 2025



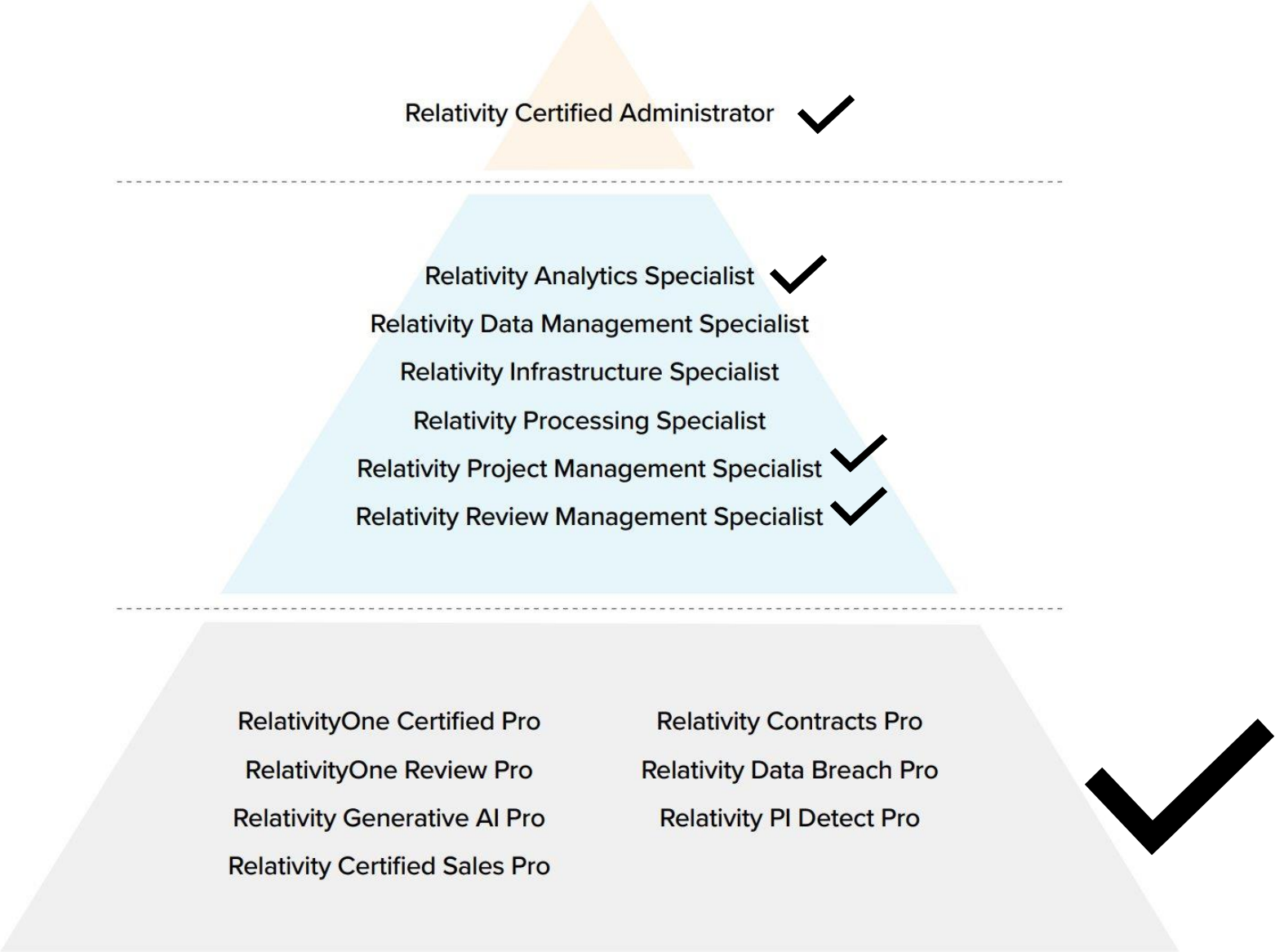
Relativity aiR for Privilege Pro exam



aiR for Review added to relevant exams



# Relativity Exams testing on aiR for Review in 2025



# Relativity Learning



# Relativity Learning

- Find Relativity's latest courses (AI products and more!) in Relativity Learning
  - Access via the Relativity Community.
- [AI Fluency: AI and Relativity Products](#) learning path
  - Relativity's rich AI history
  - An introduction to the aiR suite of products
  - An introduction to the first two aiR products: Relativity aiR for Review and Relativity aiR for Privilege.
- [Relativity aiR for Privilege Introduction](#) course
- You can get started today with the following to help you on your AI journey.
  - Register for this learning path in Relativity Learning today.
  - Review the Relativity Generative AI Pro Study Guide.



Relativeity®

# Thank You!

Connect with us.

Follow us on social



Visit our website

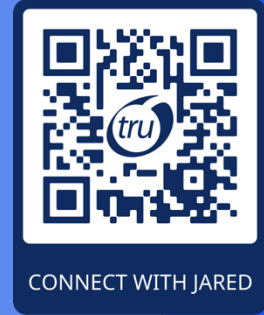
| [www.trustaffingpartners.com](http://www.trustaffingpartners.com)

Email us

| [info@trustaffingpartners.com](mailto:info@trustaffingpartners.com)

Subscribe

| [TRU Newsletters](#)



CONNECT WITH JARED



CONNECT WITH DANIELLE



CONNECT WITH PARKER

