Intake & triage:

A practical guide to automating them

Josef

Make your "legal front door" a breeze to walk through

Legal intake and triage refers to the processes by which in-house legal teams receive and assign legal matters. Or, it can mean the process of receiving instructions internally from "the client" (a.k.a your colleagues in different departments).

By its very nature the process of assigning the right people to the right task is administrative. Yet so many in-house lawyers are unnecessarily burdened with these processes. If you answer yes to any of the following questions, automating your intake could save your company a lot of time (and money).

- Are people contacting you by phone, email or knocking on your door? *Try a "digital front door" or "single point of entry" for legal requests.*
- Are new requests coming through at 5pm on a Friday? *Try a streamlined ticketing process for new matters.*
- Are internal clients waiting for work for too long with no idea when it will be delivered? *Try automating the allocation and tracking of tasks.*
- Are you asking clients repeatedly for complete instructions? *Try creating an intake tool that doesn't allow the request to come through until it is complete.*
- Do your team have little to no oversight over how matters are managed? *Try centralizing data to allow your team to monitor and better understand how matters are managed.*

For in-house legal professionals at global esports performance brand **Fnatic**, automating these inefficiencies resulted in regaining a full day of time each week. By reducing the number of repetitive steps required to generate an intake document, your team will spend less time and effort on front-end tasks and more time working on meeting the needs of your internal clients.

Automating the intake and triage process, inevitably optimizes workflows, **increases efficiency and productivity of the legal team** – all the while improving service offerings.

Explore this guide to learn how.

Preparation & Planning

The best way to begin the planning process is by knowing what needs to be fixed.

Margaret Hagan, director of the Legal Design Lab at Stanford University, asks her clients the simple question: “what could be done better?”

Here are a handful of questions to guide a stakeholder interview (be it with a colleague or client):

1. What could be better about the work I do for you?
2. How do you currently seek help in the organization?
3. How do you want to receive information?
4. Are there any specific pain-points? For example, inconveniences or inefficiencies?
5. Is there any work that I do that you think could be improved through automation?
6. Would you like to be able to self-serve any of the work that I do for you?

Once you’ve completed the necessary reconnaissance, step out the information you need to set up a matter – this will form the basis of the intake tool itself.

Next, figure out whether you can triage anyone out of the legal team (e.g. because their matter relates to infosec or compliance) – this is key to saving your team from wasting time.

“Process map” your workflow

Automating flawed processes simply embeds bad habits in a company. Taking the time to map out your triage and intake process. Break down your legal front door into visual steps to enable a holistic view of the journey.

Begin by working out exactly where and how your bot fits into the intake process. Ask yourself five questions:

1. Where does this process start?
2. Who is involved?
3. What systems are involved?
4. What part(s) is the bot automating?
5. What is the tool’s output?

Bot output is a critical part of the process. What is your bot actually delivering? Possible outputs include: guidance/advice, intake/interview of client, document, email notification.

Also consider what happens after the output. If a bot automates a document, does the user get it right away or does it get sent to the lawyer to review first? Is it going to be integrated with a matter management tool, like Xakia?

Build with the user front of mind

When a client or customer interacts with a bot, it's interacting with your company. Keep it as short and sharp as possible, to make sure you don't lose the user from the outset.

Kate Sherburn, Who Gives A Crap's Head of Legal notes "the really important thing for us was that everybody in the business could access this service. Our solution needed to be intuitive and easy to use. And that's something Josef has provided."

To do this, identify all information required from the user. We call each piece of information a variable. So, what variables does your bot need in order to give guidance, interview the client, automate a document, or send an automated email, and how will this intake information differ in each scenario?

For example, when automating a document, the manual tasks include:

1. Identify each piece of information in your document needed from the user.
2. Copy and paste them into a separate document.
3. Now you have a rough list of variables! Keep this list handy...

Another way to keep the user front of mind is by considering how to build self-serve tools into the intake process in the future. Document automation and FAQ bots are two simple yet effective means of streamlining intake and triage.

Bupa have developed bots that automate common interactions between legal and the business, like taking instructions and requests through an intake tool and directing team members to self-service document automation bots, with astoundingly successful results.

“I’m very excited by the steps we have taken and even more excited by the value automation and bots can bring to us achieving our business objectives at pace and to enable new and more modern ways of working”

says Maria Marinelli, General Counsel at Bupa

Test and iterate

No matter how well you build the digital tool, iterating and testing is crucial to making sure that you've captured all the issues – think of it as proofreading for technology. One cheap and easy way of doing this is to gather a small group of testers and collect feedback through a short survey. Here are some tips on how to do that well:

1. Choose 5-9 individuals who represent your intended users.
2. Keep the questions short, simple and open.
3. Include quantum (e.g. "on a scale of 1-10, how much did you enjoy ..."). This will allow you to measure impact over time.
4. Analyze the results carefully. Your users are experts in what they want, not what the solution should look like.

Integrate & Future-Proof

At intake, you can send client information directly to your management system, or out for e-signature by integrating the bot with your existing tech tools. Look for solutions that integrate with platforms like Docusign, iManage, Google Drive, Sharepoint and others to make it possible at the click of a button.

> **"Intake is a massive challenge for any in-house team to manage. There are competing priorities and shifting deadlines...With the connection between Josef and Xakia, we've easily saved hours of manual effort not to mention created a much more intelligent process that can scale to meet the needs of Sonder now and in the future,"**
>
> says Michael Bates, Head of Legal at Sonder

Learn more about integrations **here**.

Spread the word!

Finally, you need to make sure the new legal front door is easy to walk through. Here are three key tips to making sure your intake and triage automation tools deliver the value that they should:

1. **Meet your users where they are:** think about where your users currently look for information (e.g. on a Sharepoint page or the intranet) and consider embedding the tools there. There's no need to reinvent the wheel!

2. **Don't be shy!** Tell users about your tool and why it matters to them. And your job isn't finished with one launch email. Host stakeholder meetings, use various channels, and send reminders in the months after launch too.

Post-launch: Make sure you keep the bots up-to-date, receiving feedback from users, and keep checking usage over time.

General Counsel of BUPA, Maria Marinelli puts it simply:

> **"How do we make more time to spend on the high risk and more complex legal matters? Digital solutions and pathways are an obvious way to do this but we need to stop thinking and talking about it and just do it!"**

Continue your learning journey by **organizing a demo with Josef** today.