

Artificial Intelligence Drives Profitability and Growth for Leading Insurance Defense Firm

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Mary Sinacori,
Staff Administrator

**FLOYD SKEREN
MANUKIAN LANGEVIN, LLP**

Benefits of Foundation AI for Floyd Skeren Manukian Langevin:

- 350% increase in document processing efficiency
- 81% decrease in non-billable work hours
- Significant decrease in amount of staff needed to process documents

The Challenge

Everyday challenges facing Floyd Skeren Manukian Langevin, LLP (FSML), one of California’s leading insurance defense firms, included - long delays and repeated errors to get inbound documents sorted and filed into the document management system; attorneys waiting for documents essential to the many cases each manages; and paralegals and legal secretaries forced to spend hundreds of non-billable hours sorting, naming, and processing new file materials and daily mail.

The firm’s day-to-day process for handling large amounts of inbound mail and documents included scanning each piece individually and emailing it to the responsible attorney and their legal assistant. It was then up to the legal assistant to identify and accurately name the document, upload it to the correct matter and subfolder, alert the attorney of any particularly urgent documents like pleadings and demand letters, and coordinate with the calendar clerk to ensure proper handling of hearing notices.

“Completing the entire document filing process was simply too arduous,” shared Aimee Lynne Haverlah, Staff Administrator of FSML’s flagship Westlake Village office. “The entire process could take up to five days, especially if an assistant was out of the office or we were swamped with new referrals and sub-in files.”

FSML often receives new referrals from its insurance clients and substitutions from other law firms as large, consolidated PDF files comprising thousands of pages. They also receive CDs full of hundreds of separate, unnamed documents. Staff would use Adobe Acrobat to view and name documents and would often print the large files, physically sort them, and then scan, name and upload each individual document into the appropriate folders. “Often, we’d get file materials just days before a hearing, and it was all-hands-on-deck to get them sorted for the attorney to review,” explained Haverlah. “Sometimes, attorneys would even have to sort the files themselves, which is obviously not billable for them.”

Recognizing the need to manage documents more efficiently, FSML went live with the MerusCase Legal Practice Management System in March 2020— fortunately, just before the onset of the pandemic. MerusCase excels in document creation, time tracking, file organization, and enabling remote work critical during the California state-wide shelter-in-place orders. FSML hoped that with MerusCase, the mailroom staff would be able to handle document intake, and it could free up its legal assistants to do higher-level work.

Haverlah described the process before Foundation AI. “The mailroom would check the practice management system for each document so they could sort them by attorney, and then they would create folders of each attorney’s mail. The legal assistant would look at each document again, search for the matter again to link the case, and then tag and name the file. Then, depending on the type of document, they might also email it to the attorney to ensure it got reviewed that day.”

“By sharply reducing the number of hours needed to process the mail, our team members are spending more hours performing meaningful work. Not only are these tasks billable for the firm, but they also add value to the process and improve outcomes for our clients.”

Aimee Lynne Haverlah,
Staff Administrator

New referrals and large files were still broken up manually and then each document still had to be separately named, tagged, and filed into MerusCase.

The Approach

Foundation AI's transformative document processing platform uses artificial intelligence (AI) to process inbound documents—like physical mail, email, faxes, and large files—directly into electronic document management systems faster, cheaper, and more accurately

With Foundation AI, the mailroom staff simply loads large files or batch-scans unsorted mail. The software instantly OCRs each document to make it searchable, splits it by category, matches each document to the correct matter file, and names it to the firm's naming convention. A staff member confirms the AI results, and the Foundation AI solution inserts each document directly into the legal document management software. It can even alert attorneys and staff based on the type of document and the firm's internal protocols

The Results

After implementing the Foundation AI platform and integrating it with the firm's MerusCase system, FSML has seen a dramatic increase in document processing efficiency. The firm has experienced a 350% increase in document processing efficiency along with an 81% decrease in non-billable work hours.

Improving efficiencies and making life easier for the operations and administrative teams is excellent but increasing the firm's profitability is where the rubber meets the road. Foundation AI is enabling FSML to do precisely that.

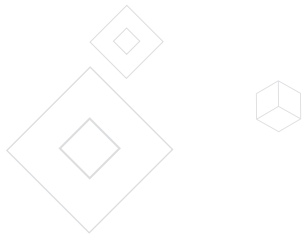
Haverlah stated, “We've increased our document processing speed by more than three times since implementing Foundation AI. The platform has allowed us to create a highly efficient centralized mail system where one or two people can accurately handle duties that before required multiple staff and legal assistants across our ten California offices.”

Integrating Foundation AI with MerusCase has delivered critical efficiencies that led to decreased error rates and increased firm profitability.

“I timed myself this morning,” commented Sinacori. “I couldn't believe how quickly I was able to process a large new file referral, and it was so easy—not stressful like it was before Foundation AI. We're opening more than three times as many new files per week using the system. I can validate all our mail and incoming faxes—for more than 30 attorneys in our ten offices—well before the end of the day, all by myself.”

The system even sends email alerts to attorneys, assistants, and staff automatically, depending on the type of document and according to FSML's internal business rules.

As every insurance defense firm knows, carriers and third-party administrators have stringent bill review processes. Most insurance companies have cut billing rates for specific tasks, and the hours spent processing the mail and setting up new files are not billable at all.



“By sharply reducing the number of hours needed to process the mail, our secretaries and other team members are spending more hours performing meaningful work,” Haverlah said. “Not only are these tasks billable for the firm, but they also add value to the process and improve outcomes for our clients.”

Foundation AI solutions are also allowing FSML lawyers to move faster and more efficiently. This efficiency will let them handle an even higher volume of cases, further increasing high-rate billable hours.

“Now, all of the documents are named consistently across all of the offices and all of the files, so anybody can find whatever they need. And Foundation AI OCRs everything to make it searchable, which the attorneys love because it saves them so much time when they are reviewing documents like medical reports,” Haverlah said.

“Of course, the other partners and I love that we are reducing non-billable hours while increasing billable hours,” stated John B. Floyd, Senior Partner. “But we also believe that Foundation AI is helping to improve our ability to provide outstanding legal defense to our clients. They are paying for our legal expertise, not our paper sorting bona fides. The more time we can allocate to performing work that adds value, the better it is for everyone. Additionally, we see the opportunity to attract talent and retain the talent we already have by providing the time and space for our team members to learn new skills that will grow their careers and contribute to the success of the firm.”

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Foundation AI Features:



Document Indexing

AI automatically speeds document indexing 5x



Human-in-the-Loop

Your staff validates low confidence extractions ensuring high accuracy and continuous improvement



Seamless Integration

Easily integrates with your existing hardware and core systems



Best-in-Class Data Security


Foundation AI is ISO 27001 and SOC 2 Type 2 certified and HIPAA compliant



Automate Document Processing

For law firms seeking to improve document processing accuracy, speed, and efficiency, Foundation AI delivers transformative AI-powered solutions that streamline labor-intensive processes, reduce costs, and optimize decision-making.

 FoundationAI.com

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