

“Your product has the same feel as MerusCase. The user interface is very clean, I think it’s very intuitive and there’s not a huge or difficult learning curve to go through.”

Asheley Alexander,
Director of Project
Management and
Operations



Benefits of Foundation AI for Bradford and Barthel:

- Documents and correspondence reach key personnel over 5X faster
- Leadership now has visibility and quantifying process data via dashboards
- Seamless integration with MerusCase

“Having visibility and quantifying processes is very important to the firm. With the Foundation AI dashboard we have that visibility and can see at all times exactly what’s going on which is a big plus for us.”

Amir Riaby,
Chief Information
Technology Officer

Revolutionizing Document Processing: How Foundation AI Transformed Processing Time for a Leading Law Firm, Streamlining Operations and Boosting Efficiency

The Challenge

Law firms handle vast amounts of inbound mail and documentation that must be managed with the utmost care to avoid errors, misfiling, and other issues. Having immediate access to these documents is critical for providing exceptional customer service, and legal professionals must have vital data readily available.

Bradford and Barthel, a leading insurance defense firm with over 100 attorneys across 13 offices in California, was challenged with the turnaround time for managing their incoming mail, which was taking up to a week to process and enter into their practice management system, causing significant delays for their attorneys.

To support business growth and enhance their legal team’s efficiency, they decided to explore the Foundation AI solution and were immediately impressed with its robust API and ability to integrate with the firm’s practice management and other core systems. With COVID challenges and the need for a flexible, work-from-anywhere infrastructure, the firm needed an integrated solution that would help to streamline its operations and improve the turnaround time for processing incoming mail and case documents.

The Approach

Bradford and Barthel sought out an automated document processing solution that had a deep integration with its case management system.

“From a technology perspective, we moved to the cloud around 2010, when it was not chic for a law firm to move to the cloud,” said Amir Riaby, Chief Information Technology Officer at Bradford and Barthel, “So for any technology we’re looking for, it must be a cloud-based solution that we can access from anywhere and it has to tie in with our case management system.”

Upon investigating the Foundation AI document processing platform, Bradford and Barthel decided it was the solution they were searching for. Foundation AI’s platform facilitates Bradford and Barthel’s document management by processing each document for searchability, classifying them by document type, matching them with their respective matter files, and assigning them file names that conform to the firm’s naming convention. The results are then confirmed by a staff member, and the documents are directly inserted into correct folders in their legal document management system. Foundation AI even notifies attorneys and staff in accordance with the firm’s internal protocols.

To ensure accuracy and prevent errors, the AI system operates on the “human-in-the-loop” principle, where human confirmation is required before documents are placed in the DMS. The Foundation AI platform continuously improves by learning from this confirmation activity and user feedback, incorporating corrections to increase its precision going forward.

The Results

Asheley Alexander, Director of Project Management and Operations explained, “Prior to Foundation AI, at the beginning of each week, we would get significant amounts of mail and it would take the remainder of the week and into the following week to get it processed. Now everything is touched within 24 hours and we’re getting it processed and in the system.”

The impact of implementing Foundation AI has been significant for the firm. The turnaround time for processing incoming mail has improved dramatically, and the law firm’s operations have become more streamlined. The law firm’s employees have been extremely positive about the software, with many saying it has been a game-changer for their operations. The clean and intuitive user interface has made it easy for employees to quickly pick up the software and get up and running with it.

Says Alexander, “The comments we get from staff about the system are – Where has this been all my life? It’s been a very positive experience.”

From a firm leadership and operations standpoint, the Foundation AI solution has also provided a window into document processing efficiency that’s measurable and allows for data-driven decision making.

“Having visibility and quantifying processes is very important to the firm. With the Foundation AI dashboard, we have that visibility and can see at all times exactly what’s going on which is a big plus for us,” stated Riaby.

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



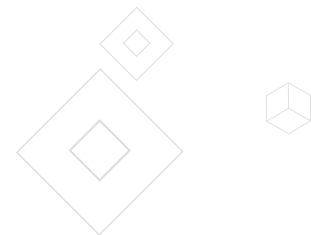
Seamless Integration

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.