

Case Study

# Streamlining Legal Matter Management Through Enhanced Search



**INDUSTRY**

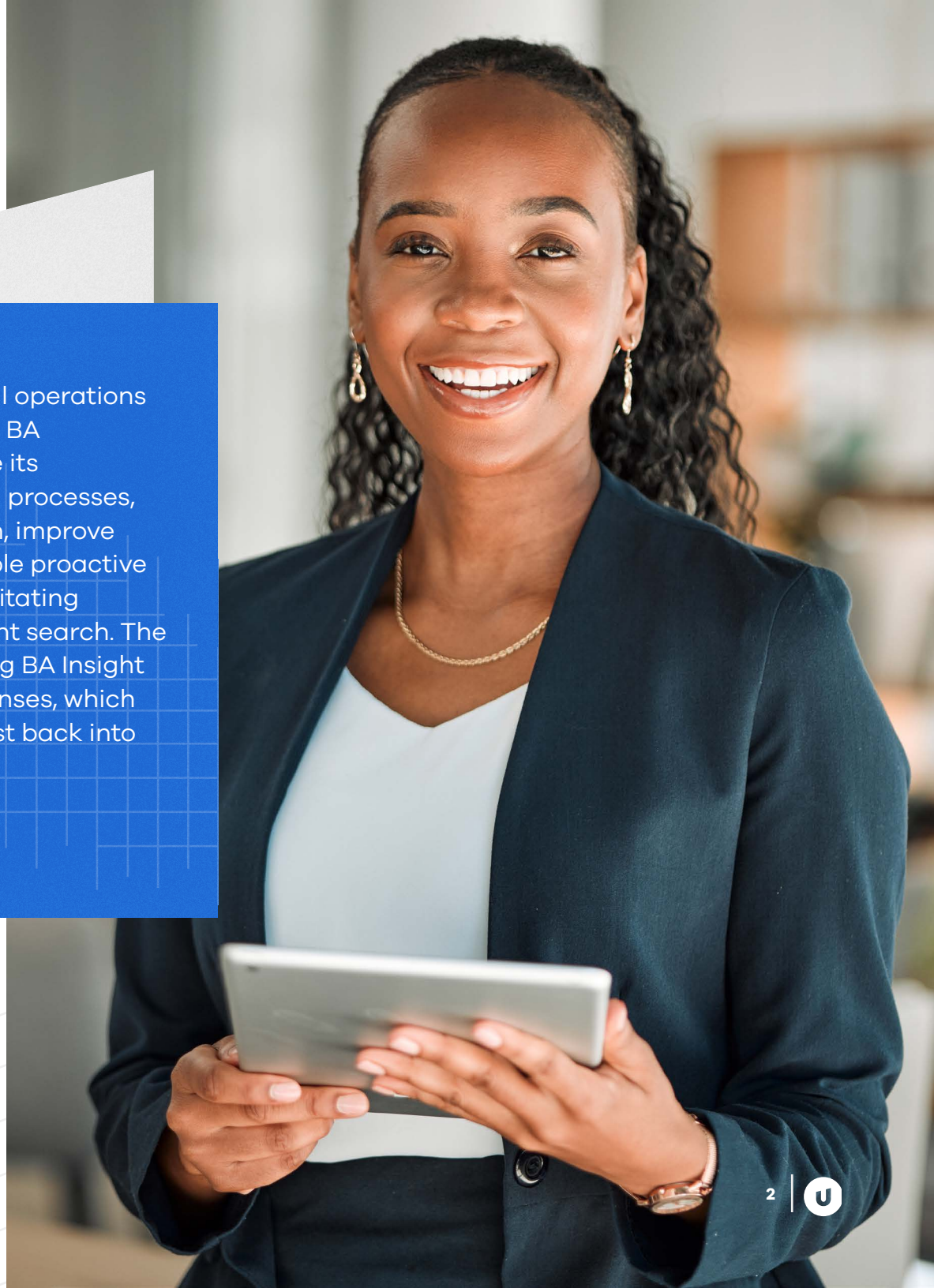
**Legal Operations**

**COMPANY**

**Fortune 500 Legal Organization**

With over \$1 billion in revenue, this Fortune 500 legal operations firm has more than 50 legal professionals across various geographies.

This international legal operations firm leveraged Upland BA Insight to revolutionize its operations, streamline processes, enhance collaboration, improve productivity, and enable proactive risk mitigation by facilitating enterprise-level content search. The results of implementing BA Insight led to decreased expenses, which they were able to invest back into the organization.



# BA Insight transforms legal operations by addressing critical needs.

This legal operations organization faced challenges, including soaring costs, inefficient information retrieval impacting contract negotiations, and a risk of errors due to reliance on external sources. They needed a solution that could seamlessly integrate into their existing technology stack, so they turned to BA Insight to put AI content search into place.

The deployment resulted in a significant drop in legal expenses, faster contract negotiations, enhanced data accuracy, and increased independence from external counsel, showcasing the transformative impact of BA Insight on their legal operations.

## **This company had three pain points they needed their legal tech stack to address.**

The trifecta of challenges this Fortune 500 organization faced were as follows: First, their legal costs were soaring due to a dependence on external counsel and paralegals for in-depth research. Second, the inefficiency in information retrieval was taking a toll on the pace of their contract negotiations and general legal matters. Third, missing key internal documents and relying on external sources for legal research increased the risk of errors and inconsistencies, potentially affecting the quality of their contracts.

The client realized these three critical areas meant it was time to put their hat in the ring and explore an AI-powered enterprise search tool for their legal department. They searched for a catalyst to correct these inefficiencies and save financial and human resources.



# Reduce costs, enhance accuracy, and give your corporate legal team the edge they need with BA Insight.

## The solution? BA Insight.

Our client was adamant that they needed a tool that integrated with systems users were familiar with for better adoption. BA Insight was added to their current tech stack via a search within those Connectors. The users did not have to learn a new software application; rather, their results were more relevant with the help of the built-in AI. BA Insight's AutoClassifier further enhanced search results.

BA Insight automatically indexed and connected content across all the enterprise's repositories from secure legal documents, shared drives, databases, and other sources of legal information. With this newfound source of information management, the legal operations team streamlined processes with the ability to

quickly locate relevant clauses, case law, statutes, and precedents to dramatically speed up research. This allowed them to be far nimbler and more responsive to the stakeholders in the business.

Automated document and metadata tagging made it simpler for legal professionals to categorize and identify relevant information specifically for their unique work needs. Not only did this help productivity, but it also assisted in maintaining consistency within document classification.

## The results were astounding.

After implementing BA Insight, the organization slashed its dependence on outsourced counsel and other legal services, which in turn led to a significant drop in expenses they were able to reinvest

back into the organization. With enhanced data accuracy and independence from external counsel, errors and inconsistencies within research and documentation plummeted, allowing legal professionals to save substantial time and focus on high-value tasks longer.

Faster contract negotiations were another big win. With access to secure, reliable, and consistent data that is connected to all enterprise repositories, deals are now getting closed faster than ever, giving this organization a substantial advantage over direct competition.

upland

**BA Insight**

For more information visit: [bainsight.com](https://bainsight.com)

**Upland BA Insight** leverages AI technology to deliver an advanced search experience with results that are relevant, personalized, and actionable. The connector-based technology works with enterprises, customer portals, and web sites, turning searches into actionable insights, regardless of where content or users reside.