

Case study

Recommendations of robotics tools in the process of correspondence registration for an international law firm

In a nutshell

For whom?

An international law firm

What did the Client want to achieve?

Review the possibility of back-office process automations

How?

Through process analysis and recommendations regarding implementation of virtual robots

What has been achieved?

Quick fixes in the process and a decision on process robotization

“Our team can bring the Client deep understanding of business processes, especially in law firms.”

Who did we cooperate with?

The Client was an international law firm, with branches in many countries, providing professional law services for leading companies on the market.

What challenge did the Client face?

It was crucial for the Client to optimize one of his core back-office processes: incoming and outgoing correspondence registration. The problem was that the more correspondence to be registered there was, the more time of administration specialists was needed. As a result, other back office processes suffered and specialists were not available enough for other tasks. Also, these employees were not satisfied about such everyday tensions at work.

How did the process work?

1. A new letter was scanned by a device connected to the organizational network.
2. The letter was analyzed by an administration specialist in order to classify what type of letter it was.
3. The letter was analyzed by an administration specialist to determine what project it was associated with
4. The file (scanner output) was renamed by an administration specialist in a way that the file name should be as most self-explanatory as well as consistent with the file name pattern
5. The file was uploaded by an administration specialist to the internal DMS (document management system). An administration specialist created a shortcut to the uploaded file and sent it to the project (case) manager via email
6. The letter was also analyzed by an administration specialist for action requirement and (if needed) for response deadline
7. The response deadline was placed by an administration specialist into Microsoft Exchange calendar as an appointment to be available for all project (case) members

8. The letter was archived and appended by an administration specialist to the case documentation

How did we solve the problem?

The solution of the problem had to be preceded by a deep analysis of the process. We analyzed such variables as:

- specification of ongoing projects, but also projects that occurred in the past and may occur in the future
- factors influencing letter classification as well as project (case) identification
- structure of DMS catalogues and principles of file archiving
- interfaces of the applications involved real communication flow between departments and employees

After this, we were able to state that the optimal solution for the process optimization would be adopting a robotics-based solution (RPA) supported by customized OCR (optical character recognition) tool.

RPA is a modern technology that changes the approach to repetitive business processes by delegating some tasks to virtual robots.

What benefits have been achieved?

The Client was provided with a deep analysis of the process that brought some conclusions regarding the change in processes.

Secondly, the Client felt confident about making his own further decisions about robotization of the process. It is valuable to adopt the robotization based on foundations such as:

- process robotization "heat-map"
- FTE (full-time equivalent) calculation
- business exceptions list
- determined KPI's for satisfying automatization

What was the advantage of our services?

Our team could bring the Client deep understanding of business processes, especially in law firms. We could not only point out business analysis elements correctly, but also help the Client in decision making processes by pointing to a much broader range of factors specific for the legal profession. It is worth mentioning that the case was quite different from common robotization implementations in typical shared service centers. As we are not only analysts and programmers, but also lawyers, we could provide the Client with the highest level of services.