

Case Study

International law firm unlocks valuable content with AI-driven search.



INDUSTRY
Legal

COMPANY
International law firm

This firm focuses on serving the Technology, Energy & Infrastructure, and Finance sectors globally. Clients worldwide call on the firm for forward-looking commercial advice on transactions, litigation, and compliance matters. Their team has supported more than a third of the Fortune 100 to resolve their highest-stakes disputes.

This legal firm used Upland BA Insight to implement an integrated intranet and enterprise search solution that put AI-driven search at employees' fingertips, regardless of whether they work in the office or remotely. Firm employees now have a modern, responsive application for access to all firm data and resources in one environment anytime, anywhere, on any device.



How can you provide superior services to clients if you can't find the right content?

This global law firm needed a better way to help attorneys and staff locate matter-centric content.

The firm's employees were struggling with search and retrieve limitations using their local intranet. Staff had to browse through hundreds of pages to locate relevant content, and that content was siloed within the confines of the intranet, completely ignoring other key systems, such as NetDocuments, in which other valuable content resided. When looking for information in those other systems, users had to access each one individually, which took time away from high-value work and reduced billable hours.

Adding to these challenges, simply managing the intranet was difficult and disorganized, as practice groups had to involve IT to make any changes. Finally, the existing intranet was built using technology that was no longer supported, increasing deployment and maintenance costs. The firm's knowledge management group, which focused on ensuring that employees working on their clients' projects had access to all the information they needed to perform efficiently, were tasked with solving this problem.

Enhanced enterprise search technology was the solution.

BA Insight worked with this firm to implement their vision of an integrated intranet and enterprise search solution that would put AI-driven search at all employees' fingertips, regardless of where they were. The key part of this vision was a single integrated search capability deployed across the entire intranet that would provide automatic categorized suggestions as users typed. As a result, staff were instantly presented with potential documents, clients, matters, and attorneys who could best assist them.



The launch of intuitive, integrated search functionality improved efficiency in a big way.

Enterprise search changes the game.

SiteCore was the platform of choice for the intranet, so integration of BA Insight search capabilities within that system was a key strategy for success. The solution was a combination of the following capabilities:

- SmartHub was chosen as the search UI to power a modern user experience including personalization, autocomplete/autosuggest, and recommendations. In addition, SmartHub was integrated directly into the SiteCore framework and UI, providing the same user experience for intranet and search.
- Connectors were added to NetDocuments, SiteCore, and SQL (for client and matter data) to provide a single index. SmartHub gave users one

point of access to all data sources so that they no longer need to perform multiple searches.

- AutoClassifier added metadata to documents that did not already have it and extended metadata on documents that had limited metadata. A combination of AI and rules-based tagging was used for automation and control.

The firm created an integrated enterprise search and intranet deployment on time and on budget. The firm-wide launch was a resounding success, and staff now have a modern, responsive application for access to all firm data and resources in one environment anytime, anywhere, on any

device. Feedback has been overwhelmingly positive, and comments range from how much time is being saved to how much better work productivity is based on the ease of access to firm information.

What's next for this legal firm.

The firm is focusing on delivering new features around contacts, which they refer to as "Who Knows Whom," so that staff and attorneys can quickly identify connections between clients and the firm, as well as explore specific AI search features, such as natural language queries and bot-driven search UIs.