

Extract Filer Fuels Expansion for Boutique California Workers' Compensation Defense Firm

After implementing Foundation AI Extract Filer, Acumen Law LLP gained more than 120 hours per week to serve clients.

Artificial intelligence (AI) and technology are often categorized as cost and employee headcount reduction tools. It's easy to see the hesitation of many smaller, often generational law practices, when looking at digitization through this lens.

But, what about firms where AI is a valuable tool facilitating growth and expansion that would otherwise be unsustainable? This was the case for Acumen Law LLP, a boutique worker's compensation defense law firm in Calabasas, California. With ambitious growth objectives, dedication to a quality practice, and commitment to its founding principles, Acumen sought to find a platform to support the firm's expansion while minimizing additional clerical costs. The firm ultimately found a solution in Foundation AI Extract Filer.

The recent implementation of Foundation AI Extract Filer has:



Decreased the hours required for inbound document processing by approximately 95%



Facilitated firm growth without requiring the hire of additional legal assistants or paralegals



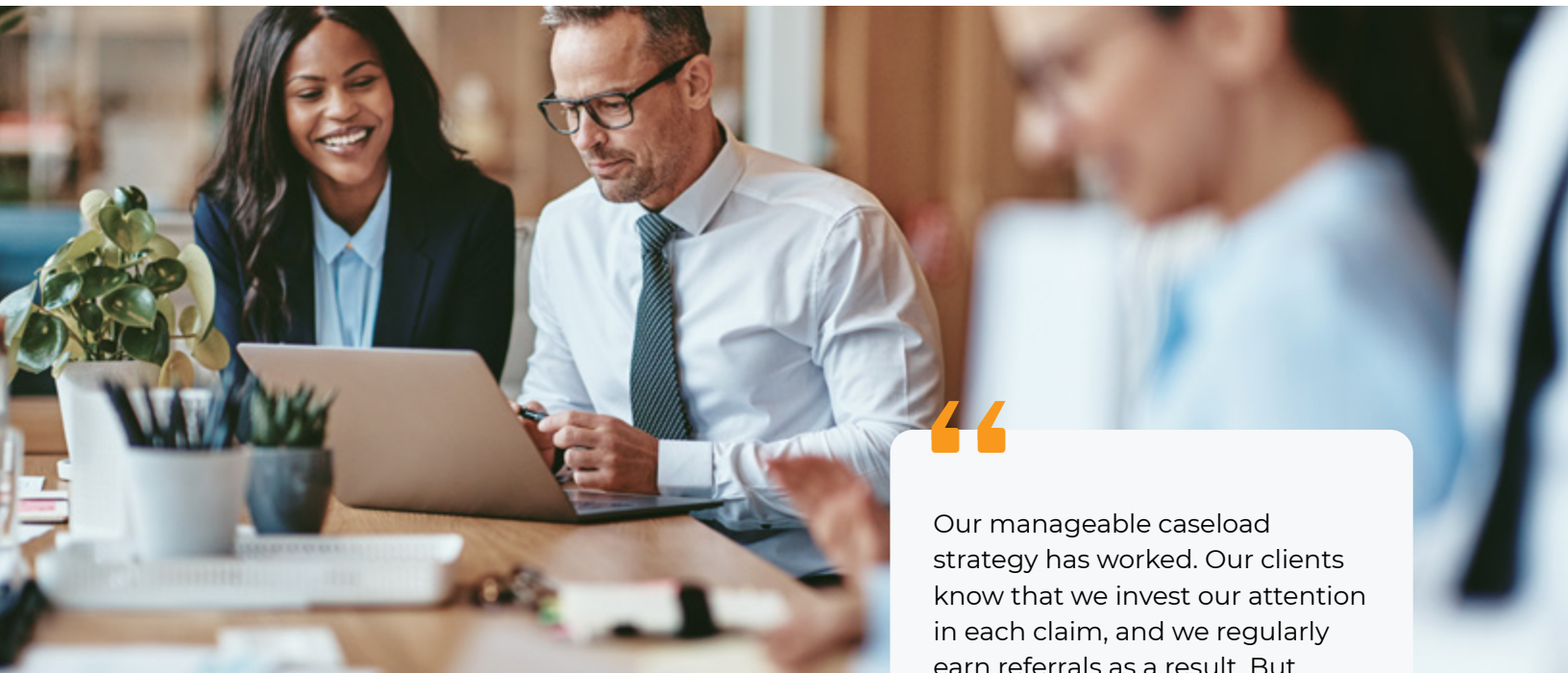
Maintained the firm's quality standards



Allowed the entire team to allocate more hours to value-creating work.

Foundation AI Extract Filer is an intelligent document intake and automation platform that 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 Extract, a team member 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 Extract Filer 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.



Profitable Growth While Maintaining a High-Quality Practice

Acumen is a boutique firm that prides itself on paying a high degree of attention to each case it handles. In fact, managing partners Chris Pettit and Michael Brand founded the firm on the principle of assigning each attorney a small, manageable caseload in contrast to the 100 or so cases typical for attorneys at other workers compensation defense firms. This enables Acumen's attorneys to effectively handle each claim with the care and attention needed.



Our manageable caseload strategy has worked. Our clients know that we invest our attention in each claim, and we regularly earn referrals as a result. But intense clerical, specifically document processing demands, of worker's compensation law was a growth challenge we were working to navigate. To continue an exceptional level of attention and service and maintain a profitable growth trajectory, we needed to find ways to utilize our entire team more efficiently.

Michael Brand
Acumen Law LLP
Founder

The practice of law in general, and certainly worker's compensation defense, is a document-intensive enterprise. Opening, scanning, filing, and routing thousands of documents every day is costly. Because Acumen is a boutique firm, it did not have a mailroom supporting the firm. Instead, each paralegal and legal assistant allocated sixty to ninety minutes every day to processing the mail, on top of their multitude of other responsibilities.

Acumen's paralegals and legal assistants are skilled professionals critical to effectively serving their clients. However, processing inbound documents across the firm required approximately 120 hours per week of their valuable time.



Knowing how important growth is to our partners' vision for the firm, I worked in collaboration with Foundation AI to implement Extract processes that made sure our entire team has access to the documents they need without being burdened by information that they don't.

Jim Mezzera Acumen Law LLP, paralegal and office administrator



Acumen uses Clio legal practice management software to handle client intake, cases, and billing and payments. Additionally, they use Google Drive, integrated with Clio, to manage their files and support their team's ability to work remotely.

Mezzera continued, "By closely integrating Extract with Clio and Google Drive, we were able to create workflows that route documents to the specific people who need them while flowing over the people who do not need to see a particular document. We've reduced the time it takes our paralegals and legal assistants to process inbound documents from about 120 hours per week to approximately five hours per week while still assuring the full team has access to the documents they need when they need them."

What Will Increased Efficiency Mean for Acumen's Future?

"We're a young firm that has from the beginning embraced technology that allows us to serve our clients better," stated Pettit. "However, increasing document processing costs were starting to pressure the firm meaningfully. But, with Foundation AI Extract Filer in place, we've been able to add four new attorneys without expanding our support staff."

Acumen sees a future where they can continue to attract clients, attorneys, paralegals, and legal assistants by providing excellent representation and a productive culture.

"When we first started implementing Extract, our team of paralegals and legal assistants were understandably fearful of being downsized," Brand added. "Our attorneys were concerned about negative client impacts if documents were not filed and routed correctly. However, after implementation, everyone was quick to see the benefits and how the efficiencies are an important contribution to our ability to achieve our growth objectives and that achieving these objectives will be great for everyone."



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Document Processing Efficiency Supports Acumen's Growth Ambitions

After Foundation AI Extract Filer implementation, Acumen Law LLP has experienced...



additional hours each week to fuel the firm's growth



decrease in hours required for inbound document processing

