

## Foundation AI Fuels Expansion for Boutique Insurance Defense Firm

“Intense clerical, specifically document processing demands, of workers’ compensation law was a growth challenge we were working to navigate. With Foundation AI we can continue an exceptional level of attention and service and maintain a profitable growth trajectory, ultimately utilizing our entire team more efficiently.”

Michael Brand,  
Acumen Law LLP  
Founder

### After implementing Foundation AI, 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 insurance 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.

Foundation AI is an intelligent document processing 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.

When inbound mail, correspondence and attachments are captured, Foundation AI 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 Foundation AI 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.



### Benefits of Foundation AI for Acumen Law:

- 95% decrease in hours required for inbound document processing
- Facilitated firm growth without requiring the hire of additional legal assistants or paralegals
- 120 additional hours each week for staff to fuel the firm’s growth

### Profitable growth while maintaining a high-quality practice

The practice of law in general, and certainly insurance 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 over 120 hours per week of their valuable time.

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.

“Knowing how important growth is to our partners’ vision for the firm, I worked in collaboration with Foundation AI to implement 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,**  
paralegal and office administrator

“By closely integrating Foundation AI 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,” states Jim Mezzera, paralegal and office manager.

“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,” added Mezzera.

## What does 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 Chris Pettit, Co-Managing Partner. “However, increasing document processing costs were starting to pressure the firm meaningfully. But, with Foundation AI 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 Foundation AI, our team of paralegals and legal assistants were understandably fearful of being downsized,” explained Michael Brand, Co-Managing Partner. “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.”

## 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.

 [FoundationAI.com](https://FoundationAI.com)

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