

Case Study

**Legal operations
organization
mitigates risk and
missed deadlines
with BA Insight.**



INDUSTRY

Corporate Law

COMPANY

Legal Organization with
over \$1 billion in revenue

Grappling with the complexities of evolving corporate law, this legal operations organization turned to Upland BA Insight to address their overwhelmed legal team's challenges. With a growing volume of contracts and licenses, the team faced missed deadlines and financial risks. BA Insight provided a comprehensive solution, offering connectivity with multiple repositories, advanced data security, and scalable technology.



Empower legal teams with advanced search solutions for corporate law.

How did this legal ops organization overcome information overload and deadline challenges?

Corporate law is constantly evolving, leaving this organization at a crossroads. Their dedicated team of 20+ legal professionals was overwhelmed, struggling to keep pace with a growing volume of contracts and licenses, each with critical renewal and deadline dates. As the organization grew, the complexity of managing this massive amount of information became too much to juggle, and attorneys and legal staff were often missing deadlines and facing the loss of financial resources.

This growing firm outlined three must-haves for their search experience.

To solve these challenges, the organization turned to Upland BA Insight. They wanted content search technology that met very specific needs, with three distinct requirements:

- **Connectivity:** The solution needed to connect with multiple repositories, so users could and conduct a single AI-powered search to uncover information from various sources, including their contract management platform, NetDocuments, and Microsoft SharePoint.
- **Safety:** An emphasis on data security to protect sensitive case and client information while ensuring access to pertinent content, defined by role, team, and other permissions.
- **Scalability:** The organization needed technology to align with the firm's growth and required a framework to build an environment that could include additional repository integrations.



BA Insight provided this legal organization with a secure, holistic content search solution.

This organization took advantage of seamless integration, advanced safety, and scalable AI deployment.

BA Insight was quickly implemented as an all-inclusive solution to solve these challenges. With 90+ Connectors and the opportunity to build limitless custom Connectors by request, BA Insight's contract management, NetDocuments, and SharePoint Connectors became keystone components of the firm's search experience. Bridging the gap between these repositories created a unified search view that rapidly decreased redundant application-native searches while enabling instant access to information across repositories.

BA Insight's world-class security and support team made integrating new

technologies as simple as possible for this team of legal professionals. Advanced security measures were implemented to guard against any threat, while also retaining accessibility, which meant that user permissions could remain intact across applications. Role-based access controls ensured confidential information remained secure and aligned with corporate data protection protocols and regulatory compliance standards.

With a breadth of Connectors at play and data security on lockdown, the last component the organization required was the development of an environment that could scale endlessly, no matter how many documents or human resources were needed. They required a ripe environment to deploy the best of generative artificial

intelligence (AI) on their content. This tie to AI was vital, as the organization plans to expand the use of this emerging technology continually as they grow.

The results were clear.

Once the BA Insight implementation was complete, the paradigm shifted quickly. This legal organization went from frequently missing deadlines for licensing, renewals, and other contracts, to efficiently finding information across the business while reducing time spent on pure document retrieval. By adopting BA Insight's content search solution, the firm mitigated millions of dollars in potential risk, and was able to reinvest critical financial resources back into the business, solidifying BA Insight as their trusted partner for corporate law.