

Case Study

International law firm integrates enterprise search to improve intranet access and accelerate processes.

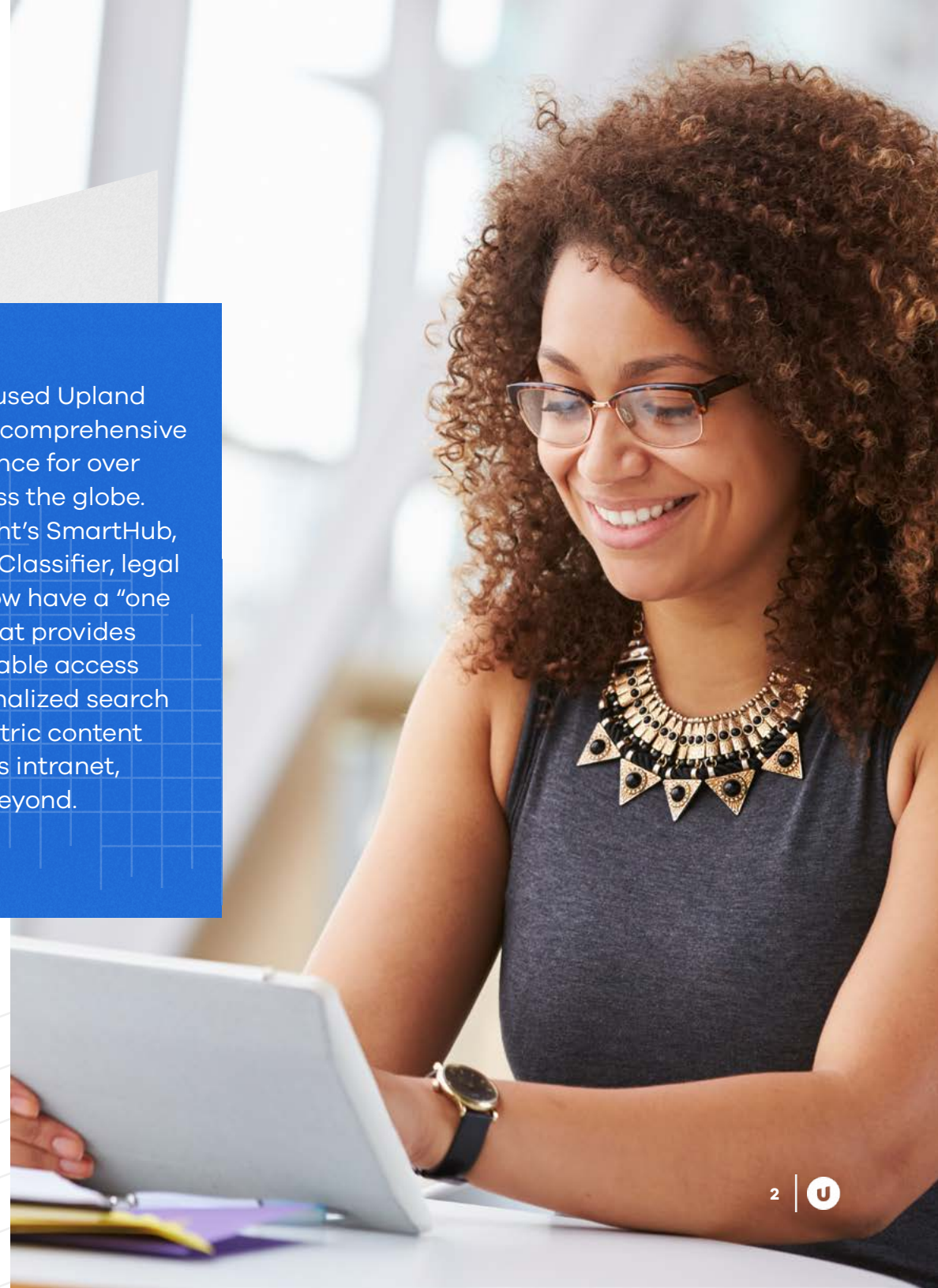


INDUSTRY
Legal

COMPANY
International legal firm

This firm of more than 1,000 staff focuses on serving the Technology, Energy & Infrastructure, and Finance sectors globally. Clients worldwide call on them for forward-looking commercial advice on transactions, litigation, and compliance matters, with more than a third of the Fortune 100 depending on their attorneys to resolve their highest-stakes disputes.

This global legal firm used Upland BA Insight to create a comprehensive single-search experience for over 1,000 employees across the globe. Enhanced by BA Insight's SmartHub, Connectors, and AutoClassifier, legal staff and attorneys now have a "one search" experience that provides them with instant, reliable access to relevant and personalized search results for matter-centric content stored within the firm's intranet, NetDocuments, and beyond.



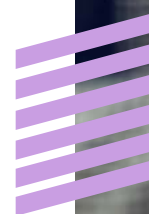
How can you quickly access case-centric content across intranet and external sources alike?

A clunky, disparate intranet search experience meant legal staff was scrambling for case-critical supporting documentation.

Employees of this firm were only able to find information by browsing through hundreds of pages via their existing intranet. The search capabilities it had only searched content that was specific to the intranet, completely ignoring other key systems in which valuable content resided. When looking for information in those other systems, users had to access each one individually, wasting a lot of time. Adding to this challenge was the fact that the intranet was hard to manage as practice groups had to involve IT to make any changes, leading to disorganized content. It was also built on technology that was no longer supported, increasing deployment and maintenance costs. Their knowledge management group, which focused on ensuring that their employees (especially those working on their client's projects) had access to all the information they needed to perform efficiently and with high quality, were tasked with solving this problem.

Enterprise search came to the rescue.

BA Insight worked with this firm to implement their vision of an integrated intranet and enterprise search solution designed to put AI-driven search at all employees' fingertips, regardless of whether they worked remotely or at various locations worldwide. 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. They were instantly presented with potential documents, clients, matters, and attorneys who could assist them. SiteCore was the platform of choice for the intranet, so integration of BA Insight search capabilities within that system were also key strategies.



Integrated enterprise search gave this firm control and access to content.

A universal, comprehensive search experience was on the horizon.

The initial phase of putting enterprise search into action included a seamless integration with the firm's intranet platform of choice, SiteCore.

The firm also employed BA Insight's SmartHub as the search user interface (UI) to power a modern user experience including personalization, autocomplete and autosuggest capabilities, and content recommendations. In addition, SmartHub was integrated directly into the SiteCore framework and UI, providing the same user experience for intranet and external search.

BA Insight also included multiple connectors to NetDocuments, SiteCore, and SQL (for client and matter data)

to provide a single index and through SmartHub, provide a single point of access to all data sources so that users do not have to perform multiple searches.

Finally, AutoClassifier was tasked with adding metadata to documents that did not already have it, as well as extending metadata on documents that had limited metadata. A combination of AI and rules-based tagging was used for automation and control.

The results.

The firm delivered on their vision of an integrated enterprise search and intranet deployment on time and on budget. The firm-wide launch was a resounding success, as acknowledged by employees and partners. Firm employees 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.

After the successful implementation of BA Insight, this firm is now focused on delivering features around contacts, which they refer to as "Who knows Whom," so that 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.

Upland BA Insight leverages AI technology to deliver a web-like advanced search experience with results that are relevant, personalized, and actionable. The connector-based technology works with enterprises, customer portals, and web sites, turning searches into actionable insights, regardless of where content or users reside.

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BA Insight

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