

A CASE STUDY

TRANSFORMING CLIENT INTAKE OPERATIONS FOR A US LAW FIRM

EXECUTIVE SUMMARY

This case study showcases how a US-based employment law firm transformed its client intake operations using Trellissoft's DocuVera360 platform. By automating document ingestion, classification, and data extraction, the firm drastically reduced intake processing times, enhanced accuracy, and doubled the capacity of its legal operations team.

CLIENT OVERVIEW

The client is a mid-sized employment law firm based in California that specializes in protecting workers' rights across the United States. With a diverse caseload involving wage and hour disputes, the firm manages thousands of documents including pay stubs, time sheets, and payroll summaries.



CHALLENGE

The firm's client intake process was heavily manual, leading to bottlenecks in the onboarding of new cases. Each case required multiple hours of staff time for reviewing, organizing, and entering information from unstructured legal and payroll documents. This process limited the legal team's capacity and slowed down client response times.

Key challenges included:

- High-volume class action cases requiring multi-employee data aggregation and analysis
- Labor-intensive manual data entry that is time-consuming and error-prone
- Lengthy client intake cycle times causing delays in case initiation
- Limited staff bandwidth to process rising case volumes
- Poor turnaround times affecting client satisfaction

SOLUTION – DOCUVERA360 LEGAL AUTOMATION

Trellissoft implemented DocuVera360 to automate the firm's client intake process from end to end. The platform leveraged document ingestion, AI-driven document intelligence, and structured data pipelines to reduce manual work and enhance operational throughput.



Key solution capabilities included:

Automated Document Ingestion



Centralized upload and categorization of intake forms, pay stubs, and timesheets.

Document Intelligence & Classification



AI models trained to detect document types and extract relevant case fields automatically.

Data Validation & Integration



Extracted data validated against predefined business rules and pushed to case management systems.



Real-Time Dashboards

1. Visual insights on case intake status, exceptions, and productivity trends.



RESULTS & BENEFITS

DocuVera360 transformed the firm's client intake operations within weeks of deployment, delivering measurable improvements across speed, accuracy, and team productivity.

Metric	Before DocuVera360	After DocuVera360
Client Intake Time	12 hours per case	3 hours per case
Data Accuracy	80–85%	97% verified accuracy
Legal Ops Team Capacity	Baseline (100%)	2.5× increase in processing capacity
Client Response Turnaround	2–5 days	Same-day response capability

Additional benefits included:

- Centralized document management and audit trail
- Reduced dependency on manual data entry staff
- Improved accuracy, compliance, and data consistency
- Integrated dashboards for KPIs and progress tracking

OUTCOME

The automation of client intake transformed the firm's operational efficiency and responsiveness. By combining document intelligence with process automation, DocuVera360 enabled the legal operations team to handle higher case volumes with reduced errors and accelerated turnaround times. The solution continues to evolve with ongoing AI enhancements, enabling faster, more accurate, and cost-effective legal document processing.





DocuVera360 transforms enterprise document processing with intelligent AI automation.



Trellissoft Inc. is an enterprise AI solutions provider specializing in intelligent automation for regulated industries. Its flagship platform DocuVera360 empowers legal, insurance, healthcare and other organizations to streamline workflows, reduce operational risk, and derive actionable insights from unstructured data.

