

MIRACULOUS OR MYTHICAL: CAN SMART INTAKE REMAKE LEGAL?

EMAIL INTAKE V's SMART INTAKE

01



INITIAL REQUEST INTAKE / ASSESSMENT

02



REQUEST ALLOCATION

EMAIL INTAKE

- Unstructured intake / lack of consistency
- No built-in validation
- Requires manual checks for completeness
- Requires manual checks for in scope
- Requires manual checks for urgency
- Lack of data captured

- Manual Allocation
- Requires manual checks for team capacity
- Requires manual determination of appropriate assignment
- Allocation through email - lack of central repository for data

SMART INTAKE

- Structured intake
- Built-in validation checks to ensure completeness, accuracy and in scope
- Built in rules to trigger approval for urgency
- Structured data capture

- Built-in triage rules to facilitate auto-triage
- Ability to view active requests with team to gauge capacity
- Structured data capture

1. Name and most positive benefit from the era of COVID

2. What are some of the challenges you see around implementation of smart intake?

POTENTIAL CHALLENGES WITH IMPLEMENTING SMART INTAKE

Challenges	
Design	Lack of process / understanding of process
	Automation without appropriate analysis
	Lack of partnership with client
Adoption	Lack of change management
	Lack of continuous improvement
	Failure to track and demonstrate benefits / value

1. Name and the best meal you've had in recent history

2. What are the potential benefits of improved smart intake? Do you have any personal stories related to it?

POTENTIAL BENEFITS OF SMART INTAKE

Potential Benefits	
Enhanced Quality	Increased first time right intake
	Increased consistency of request intake and data captured
Reduced Effort	Reduced rework
	Automation of key steps in process
Reduced Time	Reduced time to intake / assess
	Reduced time to allocation
Enhanced Data Capture	Ability to monitor request status and follow-up on static requests
	Provide insights into intake and allocation process



www.factor.law



linkedin.com/company/factor-law

linkedin.com/in/edsohn/

linkedin.com/in/fiona-donaghy-32b29914a/



[@factor_law](https://twitter.com/factor_law)

[@edsohn80](https://twitter.com/edsohn80)

8 Activities performed by smart intake - Takeaway

Smart intake activities	Initial Request Assessment Check that requestor has provided data needed to be routed and fulfilled.	Request Qualification Check that the request has an actual business need.	Request Priority Verification Check that “urgent” requests meet the criteria for rush treatment.	Request Routing & Assignment Assign the valid, correct request to the appropriate legal resource.
Smart intake management	Request Aging Management Actively monitor request status and follow-up on static requests. Request Helpdesk Help requestors navigate request intake and field questions post-assignment. Change Management and Continuous Improvement Facilitate changes to request intake/triage tools (e.g. new request types) and policies. Request Data and MI Capture data about the request intake/triage function and provide reports.			