

INDUSTRIES · LEGAL

Legal Industry Capability Brief

Operational technology built for how law firms actually work.

Twenty-three production deployments across marketing, CRM, accounting, HR, AI, and IT operations. Custom builds where the workflow is firm-specific. Configured platforms where commercial tools fit. Deep integration with the systems firms already run on: Aderant Expert, Thomson Reuters Elite 3E, iManage, FileSurf, Intapp, CourtAlert, USPTO PAIR, PACER/ECF, and the broader legal-tech ecosystem.

One deployment, a native iOS docketing application built in under six months for a top-tier IP firm, earned a Financial Times award for best use of technology in legal.

23	19	4	1
Production Deployments	Custom Builds	Configured Platforms	Financial Times Award

Practice areas: IP, Litigation, Corporate, Employment, Environmental, Government Relations

Firm sizes: 60 to 5,000+ attorneys

How We Work

Discovery first. Proof of concept before the build.

Every engagement covered in this brief started the same way. We did not show up with a solution. We showed up with questions, and we did not propose anything until we understood the problem well enough to defend the approach to a skeptical partner.

01 · Discovery

We sit with the people who actually do the work — partners, paralegals, billing coordinators, IT operations, the conflicts team, the GC. We watch the workflow, read the systems, and map the failure modes. We do not propose anything in this phase. The deliverable is a written problem statement we agree on before any architecture conversation begins. If the problem is not what the firm thought it was, we say so.

02 · Proof of Concept

Before the firm commits to a full build, we deliver a working proof of concept against the firm's real data, real systems, and real constraints. Not a slide deck. Not a wireframe. Working code, integrated with whatever the firm runs (Aderant, Elite 3E, iManage, Intapp, the docketing system), demonstrating that we understood both the problem and the technical environment. The proof of concept is the contract: if it does not convince the partners and the IT team, the engagement does not proceed.

03 · Production Build

Once the proof of concept is validated, we execute the production build against a scope and timeline both sides have signed off on. The architecture choices, integration patterns, and edge cases are settled by the time we start writing production code. The case studies in this brief are what came out of that process.

Two Ways We Build for Law Firms

The right approach depends on whether the workflow is specific to how the firm operates, or whether a well-configured commercial platform gets you most of the way there at lower cost. Most firms end up with a mix.

Custom Build

When commercial tools cannot model what the firm actually does. IP prosecution, environmental matter management, partner economics, cross-office expertise mapping. The workflows that make the firm distinctive are usually the ones no vendor has bothered to build for. We build alongside the systems the firm already runs on, not in place of them.

Typical build	4 to 11 months
Team size	6 to 14 engineers
Stack	Python, Node, .NET, Postgres, Neo4j, React, native iOS/Android
Integrates with	Aderant, Elite 3E, iManage, NetDocuments, Intapp, ProLaw, USPTO, ECF
Ownership	Source code transferred to firm

Configured Platform

When the right tool exists and the value is in setting it up correctly. Docketing, AP automation, helpdesk, candidate screening, content automation. Strong commercial platforms exist. The work is in fitting them to law firm taxonomies, integrations, ethical walls, and approval flows so they actually get used. Configuration is the difference between a tool that ships and a tool that adopts.

Typical setup	6 to 14 weeks
Platforms	Intapp, CourtAlert, FirmPilot, ServiceNow, Greenhouse, Bill.com, Abnormal, Litera
Configuration	Taxonomy, ethical walls, integrations, training, governance
Managed service	Optional ongoing tuning and support
Time to value	Measured in weeks, not quarters

Capability Mix at a Glance

Twenty-three deployments across six capability areas. The mix below shows where firms have engaged us and the headline outcomes those engagements produced.

Capability Area	Cases	Representative Outcomes
IT & Operations	4	FT-award mobile docketing; 76% reduction in deadline errors; 63% faster matter setup
Marketing & BD	3	\$2.4M cross-sell pipeline; 3x content output; 94% organic traffic growth
CRM & Client Experience	4	47% fewer status calls; 71% fewer email alerts; 3-day onboarding cut to 4 hours
Accounting & Finance	5	27-day DSO reduction; \$1.4M dispute recovery; +8.4 hrs/attorney/month captured
HR & Talent	3	52-day partner attrition early warning; time-to-hire cut from 52 to 28 days
AI & Knowledge	4	12-min RAG answers over iManage; 4hr→11min conflicts clearance; 34% more conflicts caught

Case Studies

The 23 deployments below are organized by capability area. Each entry summarizes the firm context, what was built or configured, and the headline outcome.

IT & Operations (4 deployments)

IT · **Case 01** Custom Build ★ **FT Award**

Mobile Docketing System with Three-Tier Role Architecture

 *Sterne Kessler Goldstein Fox · 200+ attorney IP firm · Washington, DC · 2015*

Native iOS docketing application for a top-tier IP firm. Four-color priority taxonomy, three actor tiers, seven-instruction de-docketing state machine, and tri-fold document access spanning iManage and FileSurf. Delivered in under six months. FT award for best use of technology in legal.

Outcome: < 6 mo to production deployment

IT · **Case 02** Custom Build

SharePoint Intranet for a Multi-Office IP Firm

 *300-attorney IP and litigation firm · Washington, DC · 2023*

Practice-aware intranet replacing a flat document portal. Attorneys see matter context, knowledge resources, and firm communications calibrated to their practice group, with iManage content surfaced inline through unified search that respects ethical walls.

Outcome: 5x faster knowledge retrieval

IT · **Case 03** Custom Build

Workflow Management System for Matter Lifecycle

 *450-attorney full-service firm · Chicago, IL · 2024*

Custom workflow engine sitting above Aderant Expert and Intapp Open that automates the steps between matter intake and matter close. Forty practice-area-specific workflow templates, conditional branching by matter type and value, and full ethical wall enforcement on every step.

Outcome: 63% reduction in matter setup time

IT · Case 04 Configured Platform

AI Docketing Platform with Court Order Monitoring

 85-attorney litigation boutique · Chicago, IL · 2024

CourtAlert AI configured for a litigation boutique running across 12 state and federal jurisdictions. Automated docket monitoring, court-rule-driven deadline calculation, calendar sync to Outlook, paralegal handoff workflow, and Aderant write-back for budget burn tracking.

Outcome: 76% reduction in deadline errors

Marketing & Business Development (3 deployments)

Marketing · Case 05 Custom Build

Client Intelligence Platform Surfacing Cross-Practice Pipeline

 500-attorney full-service firm · New York, NY · 2024

Graph-based client relationship engine pulling 18 years of matter history out of Elite 3E across six offices. Surfaces cross-sell opportunities to partners every Monday with PitchBook M&A and SEC EDGAR regulatory context. Automated origination credit attribution.

Outcome: \$2.4M cross-sell pipeline in Year 1

Marketing · Case 06 Custom Build

Practice-Area Content Intelligence System

 220-attorney midwest full-service firm · Chicago, IL · 2024

Fine-tuned content engine trained on a firm's ESOP publications and live DOL/IRS regulatory feeds. Generates draft alerts, articles, and newsletter sections weekly, published through WordPress and Mailchimp with iManage as the source of truth for prior firm thought leadership.

Outcome: 3x content output vs. manual production

Marketing · Case 07 Configured Platform

SEO and Generative Search Content Automation

 700-attorney international firm · London, UK · 2024

FirmPilot AI configured to publish practice-area content calibrated for both Google and the new generative search engines that AI assistants pull from. Replaced a £22K/month agency retainer that produced four pieces a month with a system that ships steady SRA-compliant content.

Outcome: 94% organic search traffic growth

CRM & Client Experience (4 deployments)

CRM · Case 08 Custom Build

Client Portal with Live Matter Visibility

 500-attorney full-service firm · New York, NY · 2024

Secure client portal giving in-house counsel real-time visibility into matter status, deadlines, documents, and budget burn across all open engagements. Pulls from Elite 3E, iManage, and the docketing system with strict Intapp Walls enforcement at the API layer.

Outcome: 47% reduction in status-call volume

CRM · Case 09 Custom Build

Cross-Office Expertise and Referral Platform

 190-attorney APAC full-service firm · Singapore · 2024

Graph-based attorney network platform that maps who knows what based on actual matter history pulled from Aderant Expert and iManage, then surfaces internal experts inside Microsoft Teams when new matters are opened in Intapp Open.

Outcome: \$1.6M new cross-office matter revenue

CRM · Case 10 Custom Build

Unified Notification Center for Attorneys and Clients

 650-attorney AmLaw 100 firm · Boston, MA · 2024

Single notification system replacing email floods. Attorneys see prioritized, deduplicated alerts from CourtAlert, Elite 3E, iManage, Intapp, and 8 other systems with action affordances directly from the notification. Replaces 12 separate alert streams.

Outcome: 71% reduction in email-based alerts

CRM · Case 11 Custom Build

Automated KYC, AML, and Sanctions Screening for Client Onboarding

 800-attorney AmLaw 100 firm · Washington, DC · 2024

New client onboarding pipeline that runs identity verification, OFAC and global sanctions screening, PEP checks, beneficial ownership analysis, and FinCEN BOI compliance screening before the engagement letter goes out. Triggered by Intapp Open, written back to Intapp Conflicts as system of record.

Outcome: 3 days → 4 hrs new client onboarding

Accounting & Finance (5 deployments)

Accounting · Case 12 Custom Build

Multi-Office Cash Flow Intelligence Platform

 250-attorney regional firm · Madison/Milwaukee/Green Bay, WI · 2024

Predictive collections and cash flow platform unifying Aderant Expert and Thomson Reuters Elite 3E across three offices following two acquisitions. Reduced DSO by 27 days and delivered \$980K in collections improvement in Year 1.

Outcome: 27-day DSO reduction

Accounting · Case 13 Custom Build

AI Billing Dispute Recovery System

 580-attorney AmLaw 100 firm · Washington, DC · 2024

Dispute classification system that reads each client's outside counsel billing guidelines, parses LEDES e-billing rejections from Onit, SimpleLegal, Brightflag, and TyMetrix 360, and drafts responses in the firm's voice. Recovered \$1.4M in 14 months.

Outcome: \$1.4M recovery on written-off invoices

Accounting · Case 14 Configured Platform

AP Automation for Multi-Office Firm Operations

 650-attorney AmLaw 100 firm · Boston, MA · 2024

Bill.com AI configured for a multi-entity firm with chart of accounts mapping aligned to Elite 3E, vendor history training, and approval routing by office and dollar threshold. Cuts invoice processing cost from \$16.40 to \$4.80.

Outcome: 71% reduction in manual AP time

Accounting · Case 15 Custom Build

Passive AI Time Capture and Pre-Bill OCG Compliance

 1,200-attorney AmLaw 50 firm · New York, NY · 2024

Passive time capture engine that watches attorney activity across Outlook, Teams, iManage, Word, and Zoom, drafts compliant time entries with UTBMS codes, and runs OCG compliance checks before entries hit Elite 3E Time Management.

Outcome: +8.4 hrs recovered per attorney per month

Accounting · Case 16 Custom Build

Trust Accounting and IOLTA Reconciliation Automation

 320-attorney multi-state firm · Houston, TX · 2024

Daily three-way reconciliation engine for IOLTA and trust accounts across multiple banks and offices, with automatic exception flagging, jurisdictional rule enforcement covering 14 states, and audit-ready reporting tied to the firm's practice management system.

Outcome: Daily three-way reconciliation

HR & Talent (3 deployments)

HR · Case 17 Custom Build

Partner Engagement and Retention Intelligence System

 900-attorney AmLaw 50 firm · New York, NY · 2024

Behavioral signal model tracking practice patterns from Elite 3E, origination trends, and compensation gaps against lateral market data to identify partners trending toward disengagement 52 days before typical departure signals appear. Built with employment counsel review for privacy compliance.

Outcome: 52 days average advance warning

HR · Case 18 Configured Platform

AI Candidate Screening with Bias Audit Layer

 170-attorney full-service firm · Los Angeles, CA · 2024

Greenhouse AI configured with competency profiles built from each practice group's best-performing associates, NALP-data benchmarking, and a bias audit layer over the firm's screening workflow. Cuts time-to-hire from 52 to 28 days.

Outcome: Time-to-hire cut 52 → 28 days

HR · Case 19 Custom Build

Lateral Hire and Practice Coverage Analyzer

 450-attorney AmLaw 200 firm · Atlanta, GA · 2024

Workforce planning system mapping practice coverage gaps, succession risk, and lateral hiring priorities against forward-looking matter pipeline. Pulls from Aderant Expert, Workday, and Foundation for unified visibility.

Outcome: 5 strategic hires identified

AI & Knowledge (4 deployments)

AI · Case 20 Custom Build

Practice-Area Knowledge Graph with RAG over iManage

 500-attorney full-service firm · New York, NY · 2024

Retrieval-augmented knowledge system over the firm's historical work product in iManage. Attorneys ask practice-specific questions inside Outlook and Teams and get answers grounded in the firm's own documents with strict ethical wall enforcement at retrieval. Self-hosted vector database for confidentiality.

Outcome: 12 min average time to authoritative answer

AI · Case 21 Custom Build

Contract Intelligence and Clause Library

 380-attorney corporate-focused firm · Wilmington, DE · 2024

Contract analysis platform extracting clauses from contracts in iManage, comparing against firm-preferred language, and generating redline recommendations grounded in the firm's negotiation history. Embedded as a Microsoft Word add-in.

Outcome: 64% reduction in initial review time

AI · Case 22 Custom Build

AI-Assisted Conflicts Clearance with Entity Resolution

🏛️ 600-attorney AmLaw 100 firm · New York, NY · 2024

Conflicts analysis layer that augments the firm's Intapp Conflicts system of record using corporate entity resolution and graph-based relationship inference to surface conflicts traditional name-matching misses.

Outcome: 34% increase in true conflicts detected

AI · Case 23 Custom Build

End-to-End Conflicts Check Automation for New Matter Intake

🏛️ 400-attorney AmLaw 200 firm · San Francisco, CA · 2024

Fully automated conflicts clearance pipeline running from new matter initiation in Intapp Open through attorney sign-off. Covers corporate structure resolution, prior representation, lateral attorney imputation, and ethical wall provisioning. All decisions written back to Intapp Conflicts as system of record.

Outcome: 4 hrs → 11 min average clearance time

Get in Touch

If something in this brief sounds like a problem you actually have, we should talk.

We do not run discovery calls to qualify you. Send a short note describing the workflow that is not working, and we will tell you whether we have built it before, what it would take, and whether you should buy a platform instead.

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