Armstrong Lee & Baker increased firm-wide productivity 25% by implementing the Foundation AI Platform to name and save incoming documents and dynamically assign each to the right team member

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Scott Armstrong,
Armstrong Lee & Baker LLP

Impact and Results with FAI:

- Eliminated manual document handling for 16 staff members

- Paralegals save 2+ hours per day

- AI-powered workflows ensure accuracy & consistency

- Peace of mind—critical documents are always processed correctly

- 25% increase in firm-wide productivity
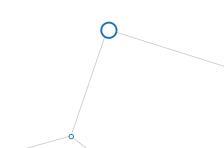
Background

Founded in Houston, Texas in 2017, Armstrong Lee & Baker has quickly scaled to 20 lawyers with many multi-million dollar verdicts and an impressive 98% case success rate. The firm's approach is centered on implementing operational best practices, supported by advanced technology like Foundation AI, to efficiently deliver the highest quality legal representation to its clients. "Having systems like Foundation AI are an absolute necessity if you're going to have everyone marching to the same tune, which you have to do if you really want to scale your firm," shares founding partner Scott Armstrong.

The Challenges Before Foundation AI

"In a firm like ours, there are so many litigation activities, from notices of affidavits to petitions, to motions, notices of hearing, notices of deposition, and all of these important documents are flowing into our service portal email box," explains Armstrong. Prior to implementing Foundation AI, each new email that entered the email box triggered an alert to all paralegals and staff across the firm.

Each staff member would continuously check the emails to see if attachments related to one of their cases, and if it did, download the document, name it to the firm's convention, and save them into its Filevine and Sharepoint systems. Then, at the end of each day, a "clean-up crew" was assigned to double-check the service mailbox and process any emails and documents that were missed. Altogether, there were 16 paralegals and staff members each spending multiple hours per day downloading, naming, and saving attachments. Armstrong knew it wasn't the best use of their time, but it was the only way he could be certain that all important documents were captured.

Before Foundation AI, each time a new document was saved, it triggered more alerts for the entire assigned case-team of attorneys, paralegals, assistants, and secretaries. Everybody would check the alert, and then based on the document type, the responsible professional would handle the document. For example, the secretary might review and calendar a notice of hearing, whereas a scheduling order would be handled by the paralegal, and a motion or answer by the responsible attorney. Alerting the whole team ensured that each document was consistently processed by the right person, though it did mean that the whole firm was bombarded by alerts throughout the day, even on documents that they didn't need to see or handle.

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FOUNDATION AI
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The Role of Foundation AI in Transformation

"Foundation AI has been the biggest gamechanger of any software for our operations," asserts Armstrong. The Foundation AI Platform implements directly with the service portal email box and automatically processes all incoming documents into Filevine and Sharepoint. 'Now, with Foundation AI, all faxes and notices are processed through a single system, eliminating manual checks and reducing the risk of missed or overlooked documents. Everything is automatically tagged, sorted, and routed to the right person. This ensures nothing is lost in transit, enhancing consistency and improving the efficiency." If the AI is unsure of any document or decision, a staff members reviews and double-checks in the FAI Worklist to ensure accuracy.

"Instead of having 16 highly skilled and very busy cooks in the kitchen, saving things, and counting on them all to never drop a ball, I've now got 4 administrative staff handling it in addition to their other tasks. Not only is the quality control much better, but now my most skilled workers can focus on the things that are really meant for them," explains Armstrong.

Dynamic Role-Based Tasking

Once Foundation AI determines the type of document, the AI looks in Filevine to determine who it should be assigned to based on the firm's preferences, and it sends a fully auditable alert to only that person. "There is a lot more signal and a lot less noise because the right people are seeing the right things, and not everything else that they don't have to see. I don't need my attorneys or my paralegals to see notices of deposition, because the secretaries calendar them. I have certain paralegals that focus on answering discovery, and so my expert paralegals don't need to see that discovery has been received." Eliminating non-essential alerts drastically reduces distraction and allows attorneys to stay focused on the work that matters.

Conclusion

Since implementing Foundation AI, each paralegal saves approximately 2 hours per day, and eliminating distractions has made the entire firm 25% more productive. The entire function of naming, saving and assigning incoming documents is now done consistently, accurately, and cost-effectively through a combination of Foundation AI and a few entry-level administrative staff using the system in between other duties.

Scott advises, "if you want to scale your practice and be one of the dominant players in whatever market you're in, and frankly, from the leadership perspective, not have to do all the work, then you have to have systems. You need to have standardized processes or you'll be up all night wondering if everything got saved and did everything get calendared. Foundation AI takes those systems and best practices and puts them on autopilot."