

# Scaling 5x Without Adding Operations Headcount: How The Jeffcoat Firm Standardized, Automated, and Upskilled with Foundation AI



**"You don't have to be a giant firm to scale like one. Foundation AI gave us the structure, consistency, and leverage to handle 5 times the cases – without growing our team."**

**Jessica Lockhart,**  
Business Intelligence Director

When The Jeffcoat Firm first started exploring automation, they had around 600 active cases — manageable with a lean team and a lot of manual effort. But as their caseload climbed toward 900, the limits of that approach became painfully clear. The firm faced a critical question: hire more staff to keep up with the growing volume of incoming mail, emails, and other documents, or find a smarter, scalable solution?

They chose the latter. With Foundation AI, The Jeffcoat Firm streamlined its inbound document ingestion process, standardized naming conventions, eliminated single points of failure, and accelerated staff onboarding. The result? They scaled from 600 to over 3,000 active matters — a 5x increase — without increasing operational headcount.



*"If we needed a person for every 600 cases, we'd have a massive mailroom by now. Foundation AI gave us a smarter path to scale — without having to hire, train, and maintain more staff."*

**Jessica Lockhart, Business Intelligence Director**

What started as a tool to reduce manual processing became a launchpad for growth and upskilling. Foundation AI helped transform the mailroom into an entry point for high-potential talent and gave team members like Ben Markowitz the runway to rise into leadership roles. Foundation AI became a force multiplier, enabling cross-functional teams to move faster, work cleaner, and support a rapidly growing caseload — without the operational drag.

## The Challenge: Volume, Variability, and Bottlenecks

Ben Markowitz remembers the early days clearly: "I was a one-man mail show." As incoming mail volume increased, he was scanning documents, naming files, deciding where they belonged in Litify, and routing them manually — all from memory.

At 600 cases, it was doable. By 900, it was unsustainable. And yet, training someone new felt even riskier: "All the rules were in my head. No documentation. It would've taken two or three times as long to train someone else."

**On top of the labor intensity, there were deeper risks:**

- No standardized naming convention meant inconsistent records across the firm.
- Any absence created operational vulnerability.
- Document searches became difficult, with typos and arbitrary labels wasting valuable attorney time.



#### The platform helped:

- Build a standardized taxonomy for document types
- Normalize naming conventions across departments
- Route documents automatically to the right people
- Reduce document processing time by more than 50%



#### Book a Demo



## The Solution: A Smarter, Scalable Workflow for Document Handling

Rather than continue throwing people at the problem, The Jeffcoat Firm chose to automate with Foundation AI.

They worked with the FAI team to define clear requirements, integrated FAI into their workflows with intention, and then perfected the deployment through iteration.

Foundation AI picks documents up straight from the firm's scanners and automatically downloads attachments from email boxes. It searches Jeffcoat's system to match each document to the right matter, names it to the firm's standard, based on the document type, saves it to the correct subfolder, and alerts the responsible team member. Jeffcoat staff validate the AI's extractions when it is unsure, and then it executes all workflows accordingly.



*"Foundation AI makes the process nearly foolproof. You're not relying on someone to remember what to do — the system gives you clear, limited choices. That structure cuts down on errors and makes it easy for new people to get it right."*

Ben Markowitz, Business Intelligence Manager

## The Impact: Scale, Standardization, and Staff

The results speak for themselves:

- 5x caseload increase without growing ops headcount
- Standardization across 3,000+ matters
- Fast onboarding: New hires up to speed in ~2 weeks
- Upskilling: Former mailroom staff now lead business intelligence

And perhaps most meaningfully, Foundation AI has become a training ground for rising talent. Because it exposes users to every document type and workflow in the firm, it gives new hires a front-row seat to how the business operates — without requiring years of experience. That foundational exposure makes it easy to identify team members with potential and fast-track their development.



*"We look for people who want to grow. Foundation AI teaches them how our firm works. It's not a mailroom — it's a launchpad."*

Ben Markowitz, Business Intelligence Manager

## Why It Matters

Many firms assume automation is for the largest players. The Jeffcoat Firm proves otherwise. By investing early, aligning the right people, and treating AI as a partner, they unlocked operational leverage that positioned them for sustainable growth.

Foundation AI didn't just eliminate manual work. It eliminated limits.



**Let AI Match, Name, and Save  
Your Inbound Documents**

**Your people have better things to do**

(mail, medicals, bills, email attachments, faxes, you name it...)



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