

Saiontz & Kirk futureproofs its document operations with Foundation AI

By eliminating reliance on staff with specialized knowledge and standardizing document naming, saving, and routing, S&K reduced risk and increased efficiency across the firm.



“We know exactly what documents we have, and they are properly classified every day. That’s the foundation for everything else we want to build.”

Austin Kirk,
Saiontz & Kirk

Background

Saiontz & Kirk, P.A. is a nationally recognized, family-owned law firm based in Baltimore, Maryland, with over 50 years of experience advocating for individuals in personal injury, medical malpractice, and product liability cases. Over the years, it has consistently invested in new technology to streamline its operations. As the firm scaled to handle more cases and more documents, its leadership recognized the need to upgrade its tech stack to standardize its processes, reduce its reliance on individuals with specialized knowledge, and improve its data quality. That’s when they turned to Foundation AI.

The Challenge

Before Foundation AI, Saiontz & Kirk used a custom built barcode-based scanning system to manage its inbound document intake. At the time, it felt efficient—and compared to fully manual processes, it was. But the system still required people to look up each matter manually, and the user needed to understand all of the different document types to use the system to create the right barcode.

At one point, S&K was down to only one person who could properly operate the system. **“I couldn’t believe that such an important process relied on one person,”** recalls Juan Carlos Puga, a supervising attorney with the firm. **“If he quit or made a mistake, we had no fallback.”**

That created massive operational risk and made it nearly impossible to scale or even cover a vacation. Training someone new meant weeks of onboarding and a steep learning curve.

Moreover, the system was becoming difficult to maintain, and nearly impossible to tweak to adapt to the changing needs of the business.

Key Results with Foundation AI:

- De-risked operations by eliminating reliance on individuals with specialized knowledge of workflows and rules
- Cross-trained team members to manage processes in under 1 day
- Enabled more detailed and searchable document naming
- Boosted attorney efficiency with auto-summarized file titles

Foundation AI Transforms Document Ingestion and Processing

Saiontz & Kirk replaced the barcode system with the Foundation AI Platform. Foundation AI integrates with its scanners, as well as its email boxes and other ways in which it receives documents. Where previously, a staff member had to look up case information and fill out fields to create a customized bar code to place on top of each document, the FAI Platform uses AI to match each document to the correct matter, classify it to a particular document type, summarize it, and save it into the correct folder. It even alerts the responsible attorney or staff member, based on S&K’s rules for each particular document type.

With Foundation AI, Saiontz & Kirk eliminated the knowledge bottleneck. Document categorizing, naming, and routing are now driven by the system—not by personal memory or ad hoc processes. Training a new person takes a single day. If someone is out, another staff member can step in immediately.



"We used to have all the rules stuck in one person's head. Now it's all in the system—way less risky, way more scalable."

Juan Carlos Puga,
Saiontz & Kirk

"You scan, validate, and go. That's it," said Juan Carlos. "There's no special process or fragile steps. It's seamless."

New staff no longer need to understand nuanced intake procedures or worry about breaking the system. If something goes wrong, it's easy to flag and correct without disruption. "It's pretty dummy proof," he noted.

Impact: Organization and Searchability

One of the most immediate benefits has been improved organization. Before, letters from insurance companies were saved under generic titles like "GEICO Letter," forcing attorneys to open multiple files just to find the one they needed.

"Now, the naming conventions include summaries," Juan Carlos said. "When someone asks me to look at a case, I don't have to open 15 files. I see the title and know which one I need."

Attorneys and managers—who often step into a file cold—benefit the most. "The people handling the case day-to-day might know what 'March Letter' means, but I don't. When I'm reviewing a case late at night, those summaries in the file names are game-changing."



"When I'm reviewing a file late at night, I don't want to open 15 PDFs to find what I'm looking for. Now, I don't have to."



Risk Reduction Through Simplified Onboarding

With Foundation AI, the firm is no longer captive to a few individuals with specialized knowledge. "We had someone new come in and handle the workflow in a single day," Juan Carlos said. And everything is auditable and trackable. "Even if she made a mistake, it was recoverable. There's no fear anymore."

Enabling AI at Scale

The benefits of Foundation AI go well beyond the mailroom. Partner Austin Kirk explained that now that the firm is capturing and organizing its documents consistently, it can feed its organized data into other AI systems for document summarization, medical chronology, and legal analytics.

"We know exactly what documents we have, and we have them properly classified every day. That's the foundation for everything else we want to build," explains Kirk.

Closing Thoughts

The Foundation AI software has been game changing for Saiontz & Kirk. It helps that S&K's best practices are followed without risky reliance on individuals with specialized knowledge. It opens the door to implementing AI across the firm. As Kirk put it, "Foundation AI is the gateway. Every other system we use needs these documents. Now we know we have them." And it does all this while also optimizing S&K's process, automating many of the steps to name, save, and route its incoming documents. As Juan Carlos puts it, "It just works. And when something works, you don't go back."

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