Transforming client on-boarding through intelligent automation

SHINE LAWYERS

OUR CLIENT

Shine Lawyers, Australia is a law firm that specialises in personal compensation claims; disability, insurance and superannuation claims; and class actions – on a "no win, no fee" basis.

THE CHALLENGE

As a firm focused on cutting legal complexity, Shine wanted to simplify its client on-boarding process.

Originally, every potential new client was taken through a manual Q&A process via the call centre, to gauge whether they had a viable lawsuit. These Q&As often took the better part of 30 minutes – which was a substantial time commitment, given that this was not necessarily time the firm could bill for. Firstly, not all enquiries lead to viable cases; and secondly, Shine offers all services on a no win, no fee basis.

Furthermore, when cases did pass the initial Q&A stage, additional information had to be gathered manually; and then call recordings were passed on to personnel for manual transcription and appointment setting with the relevant legal professional. This increased the manual workload and costs associated with client on-boarding.

When Shine wanted to move to a digital solution to improve their on-boarding process, their Chief Information Officer (CIO), Luiz de Almeida, along with their internal marketing team engaged K2 to assist with their technology integration.

"We needed to ensure that a huge amount of custom code was not required. We wanted to ensure maintenance would not be a considerable burden that the user experience was front of mind".

Shine had already invested in the K2 digital process automation (DPA) platform, which offers easy integration with multiple different systems, as well as the tools to create custom digital forms that offer a user-friendly experience for clients and staff.

"We already had an investment in K2, which we can use from the cradle to the grave on this type of project. The security settings were all in place and we had already gone through all the rigorous testing with K2."

"This put us in a position where we could focus wholly on the outcome and prioritise the user experience."

-Luiz de Almaida, CIO, Shine Lawyers

Having recently watched *rapid*MATION present a session on K2 at a legal innovation summit, Luiz set up a meeting with us and briefed our team to build an intelligent automation solution for on-boarding Shine's clients, powered by K2.

THE SOLUTION

*rapid*MATION met with the Shine marketing team and explained that instead of engaging in time-consuming and costly development projects to integrate forms into Shine's on-boarding systems, we could create a solution using K2 Smart Forms and Smart Objects.

We began with a 10-day Proof Of Value project, during which we created K2 Smart Forms that replicated the forms Shine had already created. These new K2 Smart Forms are both interactive and intelligent.

Depending on their responses, clients may be directed down specific branches of questioning, to speed up the process and enhance the customer experience.

The new solution takes potential clients through a number of rule-based steps to ascertain whether Shine can assist them. If a case is deemed viable, the solution automatically presents the client with a form that is related to the type of claim they should make.

The solution also uses the addresses collected (i.e. where the client lives and where the accident took place) to direct the client to the appropriate Shine branch. This is a critical step, because clients can only legally claim in the state where the accident occurred.

We also created many Smart Objects integration components, which connect the digital forms with:

• Shine's content management systems.
• The Google API, so the solution can access the calendars at the relevant Shine branch to pick up the times that relevant lawyers are available.
• Customers are given a self-serve option, to book the appointment slot, which is then confirmed by the lawyer – triggering an automated appointment confirmation email and SMS to the client.
• Shine lawyers' calendars, so appointments can be booked at appropriate times. Clients are given a self-serve option, enabling them to request convenient appointment dates and times.

By automating these question flows and associated process steps, Shine has been able to dramatically reduce the amount of manual work involved in the new enquiry on-boarding process. Additionally, there's no need for legal professionals to get involved until an appointment is booked. At this stage, the lawyer receives comprehensive and up-to-date information on the case (with an optimised data verification step in-between).

RESULTS

We kicked off this project with a limited release and the first phase has already provided exceptional value for Shine.

"We decided to start simple and selectively trial the solution, making it available only to people who are looking for a specific type of legal service. Within the first couple of days, the responses came in. In the beginning, we rang a bell every time an appointment came in, but soon we had to put a stop to this as the bell was ringing so often, it became disruptive," Luiz explains.

> "With *rapid*MATION leveraging our existing K2 investment, we managed to deliver an exceptional solution in a very short timeframe – which astounded the business"
> -Luiz de Almaida

Shine is not only reducing the load on the call centre and its lawyers, but also building a healthy pipeline of appointments that may otherwise have been lost.

"We are potentially tapping into a market that we may not have reached before. We're giving people who may not have contacted our call centre, due to the time of day and other factors, an opportunity to book an appointment in a convenient, digital way," Luiz adds.

LOOKING AHEAD

Following on from this project's success, Shine and *rapid*MATION are currently working on several intelligent automation initiatives that leverage our client's K2 investment and our expertise in intelligent automation.

Besides evolving functionality, Shine is also focusing on taking a hyperautomation approach, and extending the current technology stack and automation expertise across to other lines of business – to accelerate digital transformation across the enterprise.

> "We have a technology platform that we can use across the rest of the business, as well as lots of IP that we can reuse over and over again."
> -Luiz de Almaida

To optimise something as simple as a leave request or travel request approval process, or something a lot more complicated. We won't have to retrain people to use the technology – making new solutions easier for people to use, and IT to secure and support."