



CASE STUDY

Epiq innovates legal services and improves client outcomes with intelligent automation.

Organization profile

Epiq is the world's largest Alternative Legal Services Provider (ALSP), taking on large-scale, complex tasks for corporate counsel, law firms, and business professionals with efficiency, clarity, and confidence. Epiq streamlines the administration of legal and business operations, class action and mass tort, eDiscovery, regulatory and bankruptcy matters, and more.

Results

100k+

Automated tasks completed

10k+

Hours saved

99.98%

Error free delivery rate

50–60%

Decrease in turnaround time

42%

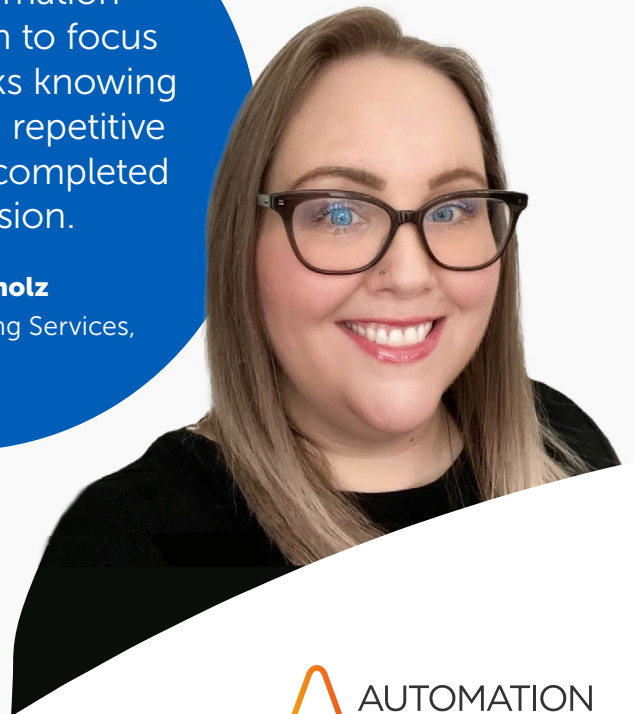
More work efficiency



Process automation allows my team to focus on complex tasks knowing that simple and repetitive operations are completed with precision.

Kerry Eichholz

Sr. Manager, Hosting Services,
Epiq





Challenge

Epiq was striving to streamline its operations and improve how it served clients. They observed many swivel-chair processes across their organization where employees were bogged down going back and forth between systems to complete one task. The processes were repetitive and inefficient, hindering their ability to scale business in the future without adding headcount.

Solution

The legal industry has been one of the slower sectors to leverage intelligent automation practices. With an innovative mindset and to enable legal teams to operate more effectively, Epiq designed the Epiq Legal Service Management framework, a future-thinking approach that includes making all legal data accessible—using a data warehouse—for analysis and the creation of legal intelligence, layering in the exceptional legal services that Epiq offers, and making it all available to legal functions via an easy-to-use, secure, and unified platform. As part of that framework, Epiq foresaw the immense value in integrating automation technology within its practices. Desiring a cloud-native platform that could connect to Salesforce, Epiq turned to the Automation Success Platform, and thanks to its low barrier to entry, they were able to get running in a very short time. Since commencing their automation program in June of 2020, they have deployed 127 automations across their Evidence Intake, eDiscovery Processing, and Production workflows, and last year alone, these automations completed over 100,000 tasks.

Processes automated

- SFTP media intake (Secure File Transfer Protocol)
- eDiscovery processing
- eDiscovery production
- OCR (Optical Character Recognition)
- eDiscovery project lifecycle management (creation, deletion, archiving)



Automation has removed repetitive tasks, reduced errors and rework, decreased time to deliver, freeing us up to take on new workflows.

Russell Lindsay

Sr. Express Services Specialist,
Epiq

The whole story

Epiq serves clients through their Epiq Service Cloud—the client-centered working environment used to execute their portfolio of services, add a layer of improved security, and provide access to legal business intelligence. Before automation and the Epiq Service Cloud, workflows required several hand-offs between humans and disparate systems and applications. Acknowledging that their ability to scale quickly was finite and couldn't be accomplished by only adding headcount, Epiq deployed automations with the Epiq Service Cloud to increase efficiency, scale business, and remove redundant tasks from employees' plates. And with the vision and sponsorship from executives, the company was able to drive significantly better outcomes for clients.

For example, once evidentiary data is collected, it is now uploaded into the Epiq Service Cloud as part of the evidence intake process. An automation then tracks it through the chain of custody, extracts it, and stages it for processing. Later, another automation processes the data in an application before the final automation performs validations against instructions, parses the data, and engages an application to execute eDiscovery production.

Epiq also put the power of automation at their clients' fingertips through a self-service platform known as Epiq Access, which is the "front door" to the Epiq Service Cloud. There, clients can open new work requests or upload data directly to Epiq rather than going through a project manager first.

These innovative solutions yielded 50–60% faster execution, 99.98% accuracy, and increased scalability for the business, as employees were no longer burdened by repetitive work. In fact, their existing workforce was able to take on 42% more work with the 10,000 annual hours saved with automation. Most importantly, automation contributed to increased employee satisfaction, as well as improved client experience and satisfaction, elevating the company's overall NPS score.

The future

In 2022, Epiq deployed 20 new automations. The plan for 2023 is to exceed that number while also developing more robust end-to-end automations within their Epiq Service Cloud workflows. Client experience remains top-of-mind for Epiq, so they will continue to prioritize enhancements to the self-service automations within their client-facing Epiq Access platform to ensure clients don't need to rely on sending emails and awaiting responses in order to address their needs.

About Automation Anywhere

Automation Anywhere is a global leader in Robotic Process Automation (RPA), automating business processes with software bots performing repetitive, manual tasks, resulting in productivity gains and improved customer experience. Visit www.automationanywhere.com.

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