

Market-leading law firm streamlines information intake

A leading UK law firm recognized as a market leader in general insurance claims handling and legal services needed a more efficient way to capture information submitted through forms. Its administrative staff was retyping information manually, duplicating information input, and wasting time and valuable resources.

Automated information capture

Using its **Power Platform Development Model**, Xpedition proposed the firm automate incoming information through emailed PDFs. This meant the firm's systems could more easily ingest new information according to best practices in risk mitigation and due diligence.

Results

Thanks to Xpedition's close partnership with Microsoft, we were able to secure funding for the project that allowed the firm to embark on a proof-of-concept. The goal? Accurately classify and route emails while importing critical information from the body of the email or attachments utilising key Microsoft solutions:

- **D365 Customer Service** for cases and queue monitoring
- **Power Automate** for improved workflows
- **AI Builder** for form processing and data classifications
- **Dataverse** for data storage
- **M365 / Exchange** for effective email routing
- **Power BI** for additional functionality, reporting, and dashboards

When an email is received, a case record is created using **Power Automate**, populating form fields with information contained in the completed PDF. Then a copy of the email is archived along with any attachments. The **AI Builder** classifies the case according to the email content and assigns a score based on the depth of information provided in the PDF, automatically creating the case work type that directs the firm's next steps. If a qualifying score can't be assigned due to insufficient information, the matter remains unclassified until it is manually allocated.

Today, the process has so revolutionized the firm's administration that it is now considering adopting predictive analysis with **Azure Data Lake** and **Azure Synapse Analytics** to help project case outcomes and costs, and improve interaction with insurer panels for a more collaborative experience.

Learn more at <https://xpedition.co.uk/about-us>