

CASE STUDY

Modernizing Legal Intake and Attorney Assignment for Operational Scale

Complex legal workflows rationalized, documented, and ready for automation



Client Overview

One of the largest personal injury law firms in the United States operates across multiple offices with hundreds of staff and over 80 attorneys handling a **continuous, high-volume flow of cases** spanning car accidents, medical malpractice, wrongful death, and catastrophic injury.

At that scale, **intake speed and assignment consistency** directly impact client outcomes. As volumes grew, the firm needed an operational foundation that could keep pace.



Business Impact

The engagement gave the firm a **structured, documented foundation** for legal intake and case assignment that did not exist before, replacing fragmented, tacit processes with a model built for consistency and scale.

Key outcomes:

- Intake and attorney assignment **workflows fully mapped and documented**, with **explicit decision logic** replacing institutional knowledge
- **Business rules and routing criteria** surfaced, validated, and structured for repeatable application across case types
- Tighter alignment between firm leadership, legal operations, and delivery teams around a **shared future-state blueprint**
- A prioritized **implementation roadmap and automation backlog** ready to carry the firm into the **next phase of execution**



Business Challenges

Intake and assignment processes had grown organically over time, creating undocumented decision logic, manual handoffs, and workflow inconsistencies that posed real operational risk at scale.

- **Assignment logic** lived as institutional knowledge with no documented routing criteria.
- **Workflow variations** by case type created inconsistency and increased error risk.
- **Manual handoffs** limited end-to-end visibility and introduced delays.
- **Fragmented documentation** made it difficult to identify bottlenecks or plan for capacity.
- The firm needed a **technology-enabled model** that could **scale** without compounding these gaps.



Project Requirements

- Map and rationalize **intake, qualification, and attorney assignment workflows** end to end.
- Surface and document implicit **business rules and decision logic** driving case routing.
- Design a **standardized future-state operating model** to support higher case volumes.
- Align process design with **Orcaworks platform capabilities** and implementation priorities.
- Establish a **prioritized roadmap** for phased execution and automation.



Charter Global's Solution



Charter Global™

Charter Global deployed an Impact Pod: a compact, cross-functional team that brought legal operations, **Orcaworks platform expertise**, and **process design** into one unit, running discovery, **workflow design**, and **platform alignment** in parallel rather than sequence, with every decision tied to a **measurable operational outcome**, fast.

1 Discovery and Workflow Analysis

- Led kickoff workshops to align firm leadership and operations teams on objectives, constraints, and success criteria
- Mapped intake, qualification, and assignment workflows end to end, covering all case types, operational scenarios, and process variations
- Surfaced implicit business rules, undocumented decision logic, and manual bottlenecks that were creating inconsistency and delay at scale

3 Future-State Design

- Developed a standardized operating model with explicit decision logic, clear ownership at each step, and defined handoff criteria
- Replaced ad hoc, judgment-based routing with repeatable, documented assignment frameworks
- Prioritized workflow scenarios for phased implementation, balancing operational impact with delivery feasibility

2 Cross-Functional Delivery

- Brought together legal operations stakeholders, Orcaworks product and platform leads, and Charter Global process experts into a single working group
- Shortened feedback loops between workflow design and technical validation, eliminating silo handoffs and reducing rework
- Ensured every design decision was continuously validated against both operational goals and platform capabilities

4 Platform Alignment and Roadmap

- Connected process design directly to the Orcaworks implementation roadmap, sequencing improvements in line with platform delivery
- Produced structured decision trees and routing logic documentation ready for developer handoff
- Established a prioritized automation backlog, giving the firm a clear path from current state to a technology-enabled operating model



Why Charter Global

With over 30 years of experience, Charter Global delivers technology solutions that combine speed, operational discipline, and real-world impact.

- Impact Pod model for **cross-functional**, **outcome-oriented**, fast delivery on complex transformation initiatives.
- Deep expertise in business process redesign, **AI-enabled automation**, and **enterprise application development**.
- Proven capability across industries like **legal**, **healthcare**, and **financial services**.
- Global delivery model with **1,100+ professionals** and a **2M+ talent network**.
- Trusted implementation and transformation partner for Orcaworks and its **enterprise clients**.



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