

Streamline AI Guide

Making the Business Case for Legal Intake and Workflow Automation Software

- Identify and understand the need
- Gather supporting evidence
- Ensure alignment with organization goals
- Engage the right stakeholders
- Develop a cost-benefit analysis

In the digital age, having the right intake and workflow automation software is no longer a luxury — it's a necessity. Whether it's about streamlining operations, ensuring compliance, or enhancing productivity, the right intake and workflow automation software can be a game-changer for any legal team. But how do you convince decision-makers to invest budget in a tool when there are competing priorities and limited resources?

The answer lies in building a robust case that demonstrates the value, aligns with organizational objectives, and showcases a clear return on investment. This isn't about choosing the fanciest tool with the most bells and whistles; it's about choosing the one that fills gaps, improves workflows, and aligns with the broader goals of the business. In this guide, we'll walk you through a step-by-step guide to understanding your needs, gathering supporting evidence, ensuring alignment with organizational goals, conducting a thorough cost-benefit analysis, and engaging the right stakeholders.

Identify and understand the need

When you're thinking about adopting a new tool or system, understanding why it matters is the first step. Begin by taking a good look at your current processes. Where do things seem to lag? Where does confusion often arise? By pinpointing these areas, you can easily identify where software can step in to make a difference. What you're aiming for is a clear picture of what you want this software to achieve for you.

In-house legal teams often grapple with a high volume of requests from various business departments, and the sheer volume can become overwhelming without the right tools. Intake and workflow automation software enables in-house legal teams to be more agile, responsive, and efficient, fostering a sense of collaboration and trust with business stakeholders.

Some common examples illustrate the need:

Sales: When the sales team is in the throes of finalizing a deal, delays in contract reviews, especially when third-party paper is involved, can be a stumbling block. Intake and workflow automation software can streamline the process, ensuring quicker responses to sales requests and swift contract reviews. This efficiency not only builds trust with the sales team, but also allows companies to close deals faster and grow revenue.

Marketing: Whether it's advertising copy, promotional campaigns for product launches, or partnerships with influencers, the legal team must ensure everything the marketing team puts out there is above board. Workflow automation can expedite the marketing compliance review process, allowing campaigns to launch without unnecessary delays and ensuring adherence to any regulatory requirements.

Engineering: Engineers often utilize third-party software components or tools, leading to potential challenges with open source software licensing. An automated intake system allows the legal team to promptly address any licensing queries, ensuring that the engineering team can continue building while avoiding potential legal pitfalls.

Product: As product teams roll out new features or entirely new products, they may encounter intellectual property concerns, user agreement issues, or even data privacy challenges. Intake and workflow automation can help prioritize and address these concerns efficiently, ensuring product launches happen smoothly without legal hitches.

Human Resources: Human Resources often needs legal insights on various matters, including employment contracts, workplace disputes, or potential policy changes. Automation ensures that such requests don't get lost in the shuffle and are handled promptly by the right person, allowing HR to function seamlessly and maintain a positive work environment.

Streamline AI case study



Impact at a glance

- Reduced time spent on each legal ticket by almost 60%
- Improved visibility and trust with Deal Desk and Sales
- Access to a central system to track and manage all legal requests

Branch Metrics is a platform that helps app developers and marketers optimize mobile user acquisition and engagement. By adopting Streamline AI, Branch Metrics reduced their time on each legal ticket from 2 days to 1.7 days. This improved the efficiency of their deal desk and sales teams and provided the executive team with real-time insights, fostering better collaboration and positioning the company for success.

[Read their story](#)

Gather supporting evidence

Next, it's time for a bit of detective work. Dive into some research. Are there software options out there that seem to fit your needs? Do they truly understand what is needed for in-house legal teams? And even more importantly, can they really deliver on their promises?

There's no better evidence than hearing from folks who've been in your shoes. Find testimonials or case studies. Ask around in-house counsel and legal operations forums, such as TechGC, CLOC, and LegalOps. Real-world experiences can offer invaluable insights.

Ensure alignment with organization goals

But remember, this isn't just about finding a tool; it's about finding one that works for your organization. Consider how the software can support your broader objectives. Can it help your legal team respond faster, close deals more smoothly, or navigate risks better? These aren't just software features; they're ways to drive your organization forward.

Engage the right stakeholders

Lastly, you're not in this alone. Every organization has a group of people who, quite simply, are needed to make things happen, from advocating for budget to ensuring effective change management and actual usage.

Keep in mind that when adopting new software tools, different departments often realize shared benefits. For instance, if the legal department's increased efficiency accelerates the sales cycle, there's an opportunity for a collaborative approach. Legal teams can partner with sales leadership or other benefiting cross-functional departments to co-advocate for the software. Such partnerships can often lead to a shared budget for the purchase, making it a win-win for everyone involved.

Identify who these individuals are and bring them into the conversation early. Bring them to product demos so they can see firsthand how the software can help their teams. Listen to their insights, address their concerns, and work together to find common ground. Remember, the best software solutions are the ones that everyone believes in, starting from department leadership, and can advocate for its value and faster adoption.

Develop a cost-benefit analysis

While it's essential to know the costs upfront, it's equally crucial to understand what you'll get back from that investment. How much time will you save? A simple return on investment (ROI) calculation might look at how many hours your legal team spends managing these processes manually, calculating that cost, and comparing that to the cost of the tool.

Remember to keep in mind that the benefits aren't just cost savings — it can be time savings for business stakeholders, the ability to drive more revenue, and building more trust.

Here's an example of an ROI calculation for an in-house legal team:

Key question	Example	Calculation
A. How many minutes does it take to manually handle one legal request on average?	30 minutes	Include time for information gathering, locating relevant documents and historical conversations, and managing approvals and collaboration. 15-30 minutes is typical.
B. How many legal requests does each team member handle each week?	10 requests	N/A
C. How much time does your team spend on manually handling requests each year?	$((30 \times 10) / 60) \times 52 = 260$ hours	Take A, multiply by B, and then divide by 60 to get the number of hours each week. Multiply that by 52 weeks in a year.
D. What is the average yearly team member salary?	\$150,000	N/A
E. How much does your legal team member cost per hour?	$\$150,000 / 2,000 = \$75/\text{hour}$	Take D above and divide by 2000. This assumes a 40 hour work week, 50 weeks a year (assumes 2 weeks of vacation).
F. Manually managing legal requests costs your team this much a year	$260 \times \$75 = \$19,500$	Take C and multiply by E.
G. How many members of the team?	3 members	N/A
Each year, manual legal intake, and management of requests costs your team:	$\$19,500 \times 3 = \$58,500$	Take F and multiply by G.

Legal teams work smarter with Streamline AI

Streamline AI is the intelligent intake, triage, and workflow automation platform for in-house legal teams. Founded by a former in-house lawyer, Streamline AI consolidates all legal requests into one command center and automates review and approval routing so legal teams can work more efficiently and effectively.

[Get a demo](#)