Neota Logic

CASE STUDY · THOMMESSEN

Thommessen simplifies client matter onboarding with Neota's no-code platform

FIRM
Full-service law firm, est. 1856

USE CASE
Client matter onboarding, AML, document automation

INTEGRATIONS
Salesforce

Advokatfirmaet Thommessen AS, with offices in Oslo, Bergen, Stavanger and London, is a full-service law firm providing expert legal services to Norwegian and international companies. Innovation is a core imperative, led by Chief Digital Officer Trine Melsether.

In 2018 Thommessen began a pilot with Neota to transform knowledge processes across the firm into digital applications — improving internal efficiency, increasing accuracy, improving experience, and managing risk.

The challenge

Thommessen identified New Client Matter Onboarding as a high-volume process that was very manual and inefficient. When registering a new matter, client and case information were filed manually into an email-based form and forwarded to finance, then added to billing, matter management and CRM systems.

Anti-money-laundering routines ran with minimal system support. The finance team spent considerable time calling lawyers when fields were left unpopulated, or cross-checking other sources to ensure fields were correct.

> “Our primary goal here was to streamline a very manual internal process at the same time as getting to know the Neota platform. We are happy with the flexibility of Neota, and especially the ability to build integrations as well as document automation, and we are excited to move forward and build more tools with the Neota platform.”
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> TRINE MELSETHER
> Chief Digital Officer, Thommessen

The solution

Thommessen selected Neota as the only provider offering a no-code platform covering process, document and decision automation along with API integration to third-party systems. After a pilot and training, internal resources built the solution with workflow expertise from across the business.

They reviewed the onboarding form to keep only essential fields, then built a workflow that automatically imports pre-existing information from Salesforce — initiating onboarding from Salesforce itself — and integrates with the Norwegian company register, so users only input information not already held. Document automation generates the matter confirmation letter, and AML support was built into both Neota and Salesforce.

Why Neota Logic?

From building to launch the solution took three months, and the team enjoyed building within the Neota platform. The solution was an immediate success: lawyers valued the company-register integration that saved them time, and seeing how the matter confirmation letter assembled in Neota.

The finance team no longer has to cross-check information or chase lawyers by phone for missing fields. Overall, data quality is far better, with human errors eliminated from the process.

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