CASE STUDY

# Email Classification & Triaging

LEGAL SERVICES

Automated email classification and case actioning for a legal services firm.

## WHY IT MATTERS

- 5,000+ emails processed per month
- New filing vs. existing case identification
- Auto-lookup of attorney and paralegal per case
- ERP-integrated case update and routing
- Zero manual triage for standard email types

| 5K+ | 100% | 2 | 99% |
|---|---|---|---|
| **Emails/Month** | **Auto-Classified** | **Filing Categories** | **Auto-Actioned** |
| processed from sales inbox | intent identified per email | new filing or existing case | ERP lookup and triaging |

## AI AGENT WORKFLOW

*Powered by Avintra*

1 EMAIL COLLECTION

### Sales Inbox Connection

- Automated connection to sales inbox via API
- Real-time polling for new inbound emails
- Handles multiple sender types and formats

2 EXTRACTION

### Body & Attachment Parsing

- Extracts client name, matter & filing details
- Reads PDFs, Word docs and Excel attachments
- Normalises extracted data for ERP lookup

3 CLASSIFICATION

### Intent & Filing Classification

- Identifies if email is a new filing request
- Or correspondence on an existing case
- Confidence score assigned per classification

4 CASE LOOKUP

### ERP Case & Team Identification

- Queries ERP/case management for existing matter
- Identifies assigned attorney and paralegal
- Retrieves case status and next action required

5 ACTIONING

### Automated Case Actioning

- Creates new case record for new filings
- Routes email and docs to correct attorney
- Updates existing case with new correspondence

6 AUDIT & REPORTING

### Audit Trail & Volume Reports

- Full audit log per email and action taken
- Daily email volume and classification reports
- Exception queue for ambiguous or complex emails


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