A SPRINT TOWARDS LEGAL INTELLIGENCE

How Infosys BPM is helping an American data analytics company develop its legal AI tool, double-quick.

Abstract

Gerald Geffen, a Senior Product Manager at an American data analytics company, was tasked with accelerating the development of an AI tool for legal workflows under tight timelines. To scale quickly and maintain quality, he partnered with Infosys BPM. Within days, a team of 50 trained legal professionals was mobilized and integrated into the project. Over a 30 day period, the team delivered across the full scope of requirements, including data cleansing, AI optimization, prompt creation and classification, and the introduction of automation led operational rigor. This case study highlights how structured execution and close collaboration enabled rapid progress toward legal intelligence.

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When time is of the utmost essence

Gerald Geffen is a Senior Manager for Legal Product Management at an American data analytics company. In this role, he leads strategic initiatives to build and enhance legal research and compliance solutions designed to simplify complex legal workflows for the company's clients.

At the time, Gerald was closely involved in developing a large language model (LLM) as part of the organization's broader AI roadmap. Multiple teams were contributing in parallel, each focused on specific aspects of data ingestion, training, and optimization. Progress was steady, but the timelines were demanding.

One requirement, however, stood out. To train the model effectively across evolving legal knowledge modules, Gerald needed access to a sizable group of legal professionals. These lawyers would be responsible for generating and validating high quality, AI assisted legal outputs.

The work required a strong grounding in the US legal system, including court hierarchies, procedural concepts, and document identification.

Given the scale of the effort and the time available, Gerald decided to explore external support. After evaluating several potential partners, he engaged Infosys BPM. Early discussions with Account Manager Arth Pandey led to a clear and focused plan—to deliver the required outcomes within 30 days.

Racing against time

From the outset, Arth understood the importance of moving quickly while maintaining structure. The project required a rapid ramp up, leaving just one week to assemble, onboard, and prepare a large team of legal professionals.

Working closely with Infosys BPM's HR function, Arth mobilized a team of 50 experienced legal professionals from the organization's legal processing unit.
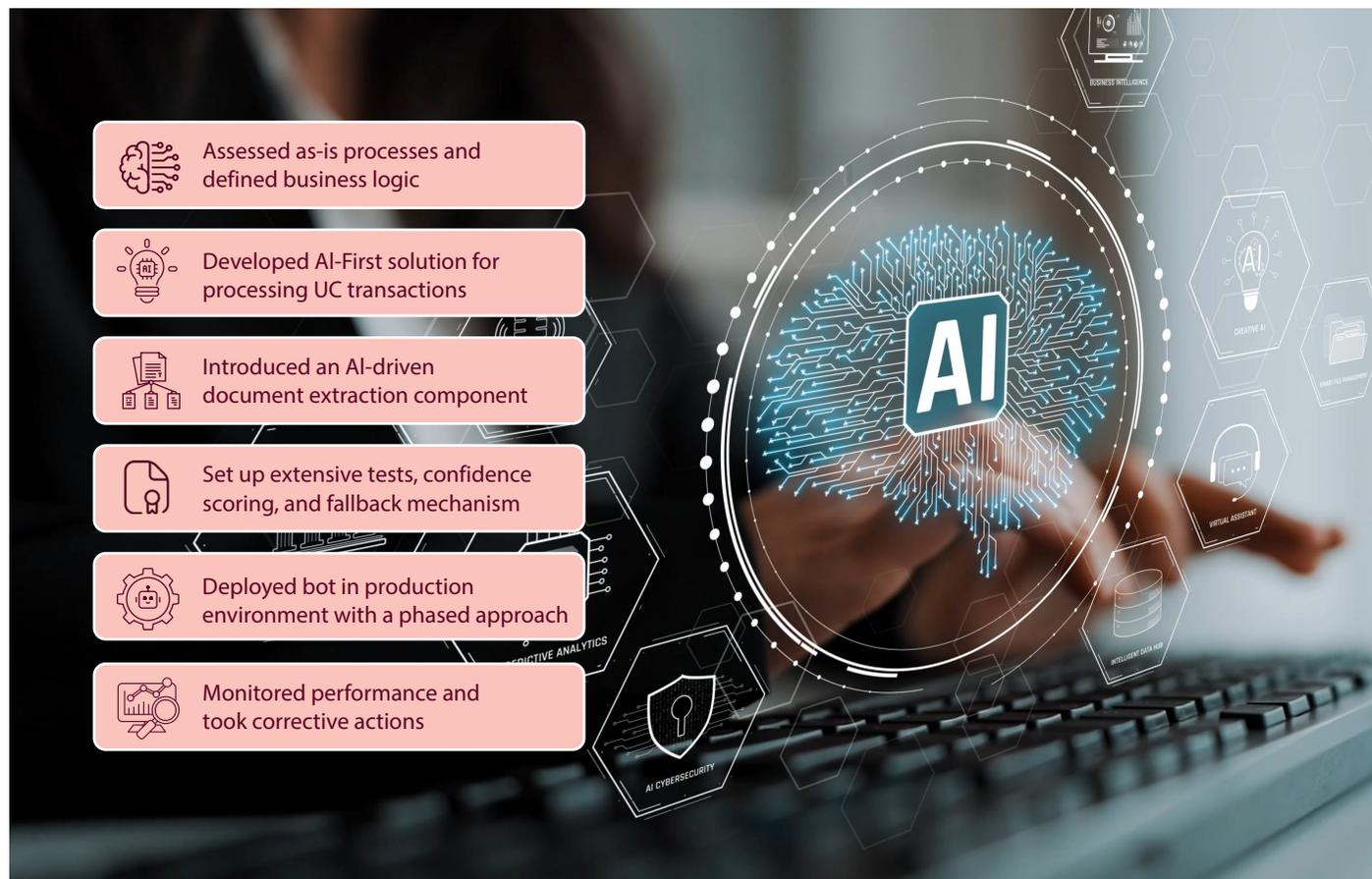
To accelerate readiness, he designed role based training programs focused on US law, court hierarchies, and document taxonomy. The content covered core elements of the legal system, including complaints, judgments, and motions, and was delivered through short, focused learning sprints.

Each training module began with an assessment to confirm baseline proficiency before moving forward. This approach ensured consistency while allowing the team to progress quickly. To support day to day execution, Arth also provided concise reference playbooks that enabled the team to generate and validate AI responses across multiple knowledge areas.

Approach summary

- Assessed as-is processes and defined business logic
- Developed AI-First solution for processing UC transactions
- Introduced an AI-driven document extraction component
- Set up extensive tests, confidence scoring, and fallback mechanism
- Deployed bot in production environment with a phased approach
- Monitored performance and took corrective actions

In parallel, Arth and Gerald aligned on governance and delivery standards. Arth defined clear structures for prompt libraries, response-validation checklists, and data-cleansing standard operating procedures, all of which were reviewed and approved by Gerald. He also implemented a human-in-the-loop quality-control framework to support accuracy and consistency throughout the project.

Once the team was trained and operational, they began by reviewing the data already ingested into the AI tool. Grammatical issues were corrected, and unnecessary ASCII characters were removed. This foundational cleanup set the stage for further optimization.

The team then restructured prompts using Boolean logic, improving the model's ability to interpret queries and generate precise responses. To strengthen transparency and backend usability, they added contextual comments to AI-generated outputs, explaining the reasoning behind selected responses. Outputs across multiple document types—including summaries and standard correspondence drafts—were refined to ensure clarity and consistency.

With the data cleansed and the AI engine better optimized, the focus shifted to prompt segregation and classification. Thousands of prompts were reviewed to distinguish court-procedure queries from transactional questions related to commercial and procedural law. Arth shared these refined prompts with Gerald on a rolling basis, enabling steady progress and alignment.

Subsequently, the team created new prompts to help the AI tool identify similar cases across different US states.

Alongside delivery, Arth worked on strengthening operational discipline. In collaboration with Infosys' automation teams, he developed workflow-management tools to track production and quality metrics, supported by executive dashboards. Daily stand-up meetings helped maintain momentum and visibility, while Gerald received regular progress updates.

At the finish line, in great time

As the project progressed, Gerald closely reviewed Arth's updates and noted the team's consistent pace and execution. This was achieved while navigating a dynamic working environment.

At times, access to stakeholders was limited, and requirements evolved as the project matured. The team also encountered routine technical dependencies, including system access constraints and intermittent tool availability, which required coordination across functions.

To address these, Gerald and Arth worked together to put stabilizing mechanisms in place. A joint working forum was established with the organization's IT teams to streamline credential provisioning, monitor system availability, and manage incidents more effectively. To accommodate evolving requests, they introduced a lightweight intake and prioritization process supported by a clear module roster and defined freeze windows.

Key benefits

- 7 FTEs saved
- 100% quality of service delivered
- 7K hours of manual efforts annum saved
- Investor experience enhanced
- Operational accuracy improved

These measures helped create greater predictability. Over time, workflows stabilized, and the team was able to focus more fully on delivery.

Within the planned four week timeframe, the outcomes exceeded expectations. The team successfully segregated 25,500 prompts related to court procedures, simplifying and standardizing them to reduce ambiguity and duplication. These prompts were accurately classified into litigation and transactional categories, improving the relevance and usability of the AI tool's responses.

In addition, the team created 10,353 new prompts to help the AI identify similar cases across multiple US states. Laws were mapped and integrated across jurisdictions, enabling the tool to deliver more contextual, jurisdiction specific responses for targeted searches.

Through this effort, Arth and his team significantly enhanced the AI tool's capabilities, supporting faster and more accurate legal research. Gerald also adopted Arth's productivity and time tracking tool, designed for scalability across future initiatives. Pleased with the results, Gerald engaged Arth for the next phase of the program. With a strong foundation in place, the team continues its steady progress toward advancing legal intelligence.

Names have been altered to preserve the identities of the people involved.

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