



# SAGE Intake and Triage Automation Client Story





# SAGE Group streamlines legal requests and improves turnaround with a structured intake process

SAGE Group's legal team was managing a steady flow of requests from across the business, but without a single, structured intake process, visibility and prioritisation were becoming increasingly difficult.

By introducing a simple, user-friendly intake form through IntuityAI by Dazychain, SAGE transformed how legal work is triaged, allocated and delivered, resulting in measurable efficiency gains for both the legal team and the broader business.

## The challenge: fragmented requests and limited visibility

Like many in-house legal teams, SAGE's lawyers were receiving requests from multiple channels, including email, conversations, and ad hoc messages, making it difficult to:

- » Accurately assess workload volume
- » Identify request types and deadlines
- » Prioritise effectively
- » Avoid duplication of work
- » Allocate matters based on capacity and expertise

Without a single source of truth, gaining oversight of incoming work and resource allocation was challenging. The team needed greater clarity and control over how legal services were requested and managed.

## The solution: a structured, centralised intake form

To address these challenges, SAGE implemented a structured intake form in IntuityAI designed to capture the essential information required at the outset of each request.

The intake process now manages nearly all legal assistance requests, with only a small number of highly confidential matters handled separately.

The form provides:

- » A centralised triage point for all incoming legal work
- » Standardised information capture to reduce ambiguity
- » Improved prioritisation and allocation processes
- » Greater transparency across the team

Importantly, the implementation process was straightforward. The primary focus was on identifying the key information the legal team truly needed to triage effectively, and designing the form to capture information without making it burdensome for internal stakeholders.

## The impact on the legal team

Since introducing the intake process, the legal team has gained full visibility over:

- » Request volume
- » Matter types
- » Deadlines
- » Allocation across team members

This visibility enabled more strategic and efficient work allocation, with matters assigned based on availability and subject-matter expertise. The team has also seen:

- » A reduction in duplicate requests
- » Faster identification of similar past matters and precedents
- » Stronger oversight of the overall workload and resourcing
- » Improved efficiency in delivering legal services

By consolidating requests into a single workflow, the legal function now operates with greater clarity, consistency and control.



## The impact on the business

The benefits extend beyond the legal team.

For internal stakeholders, the legal engagement process is now clearer and simpler. The structured intake form prompts users to provide the essential information upfront, reducing the need for follow-up queries and back-and-forth clarification. The intake form also adapts to reflect the different types of requests and workflows.

As a result, the business has experienced:

- » Faster turnaround on legal support
- » Improved efficiency in matter handling
- » Reduced delays caused by missing information
- » Early identification of duplicate or similar requests

By improving the quality of initial instructions, the legal team can respond more quickly and effectively, strengthening its role as a strategic partner to the business.

## Advice for other legal teams

The Dazychain intake form is user-friendly and highly effective in supporting the management and automation of the legal function, helping teams allocate work smarter, reduce duplication, and deliver services more efficiently.

SAGE's experience demonstrates that implementing an intake process can be simpler than expected.

Internal stakeholders adapted quickly, and the rollout required less change management than anticipated.

For teams considering a similar approach, the key is to:

- » Identify the essential information needed to triage effectively
- » Avoid over-engineering the form
- » Strike the right balance between meaningful detail and ease of completion

A well-designed intake form should support better decision-making, without creating friction for the business.