

Case study:

Boost Legal Operations in your Corporation with Bogle Legal

How BIGLE LEGAL helped boost legal operations of Santalucia Insurance in the digitalisation of the inheritance process.

Study conducted by Sweet Legal Tech

“ ...has enabled the automation of our main forms, increased productivity, reduced errors and provided better collaboration with our customers.

- Andres Narrillos - Legal Business Development Supervisor and Document Management

“ The platform provides greater agility in the execution of professional work as well as an improvement in the services offered.

- Jordi Rubio Garciapons - Lawyer Barcelona office

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About Santalucia Insurance

Santalucia Insurance is the original insurance company, and the parent company of the Santalucia Group, a business group specializing in family protection.

About Bigle Legal software

Bigle legal is the next-generation end-to-end document automation platform. Our mission is to transform the way companies manage documents. We believe it is time to say goodbye to repetitive tasks and refocus efforts on high-value, customer-centric work, and business growth.

About Sweet Legal Tech

SLT is a company offering consultancy and education services in the fields of legal technology, with the purpose of integrating efficiency and digital transformation within legal teams.

Started as an educational think-tank in 2018, SLT mapped, studied, and tested several legal technologies, by providing courses on Legal Tech in Italy (first) and in Europe (later). 2020 SLT started offering digital transformation consulting services for the legal sector.

What was Santalucia Insurance's key challenge?

Santalucía launched a Legal Tech challenge ([Impulsa Challenge!](#)) seeking solutions in the Legaltech field. With a constant focus on Digital Transformation, the goals were to improve legal operations, customer and user experience, and process efficiency.

Life Insurance Management

In particular, the challenge sought to find Legal Tech applications that could cover areas or products of the company, such as Life Insurance Management. Operational improvements and optimization was a strong focus while increasing custom loyalty.



Proposed Solution

Thanks to the collaboration with the well-known experts Sweet Legal Tech (SLT), SANTALUCIA had the chance to analyze the current inefficiencies in the Life Insurance Management process, identify KPI and blocking pain points. The analysis allowed for a customized Bigle Legal solution proposal, with the aim to provide a document drafting, collaboration and signing solution, to save time and grant increased efficiency.



Process mapping, KPI and analysis of efficiency by SLT



Giulio Messori, CEO, Sweet Legal Tech:

“As SLT, we believe that the biggest pain in choosing and transitioning to a Legal Tech solution is to demonstrate its concrete value in terms of KPI. Thanks to our experience in educating legal teams in the Academy we organize, and with tailored partnerships with the best legal tech companies we designed our consultancy service for legal teams with one key point in mind: process efficiency”

How we did it

We gathered preliminary data on all the phases constituting the Life Insurance Process together with two main KPI: time spent for each phase and average downtime (average time blocking each phase from its expected).

Sweet Legal Tech represented the Visual Process by using a swimlane methodology, where the stakeholders involved are represented in different columns.

We then conducted Design-Thinking sessions with the Legal Team at Santalucia, where we had the chance to present the Visual Process and the KPI. The session was key to refine the process and complement it with other details.

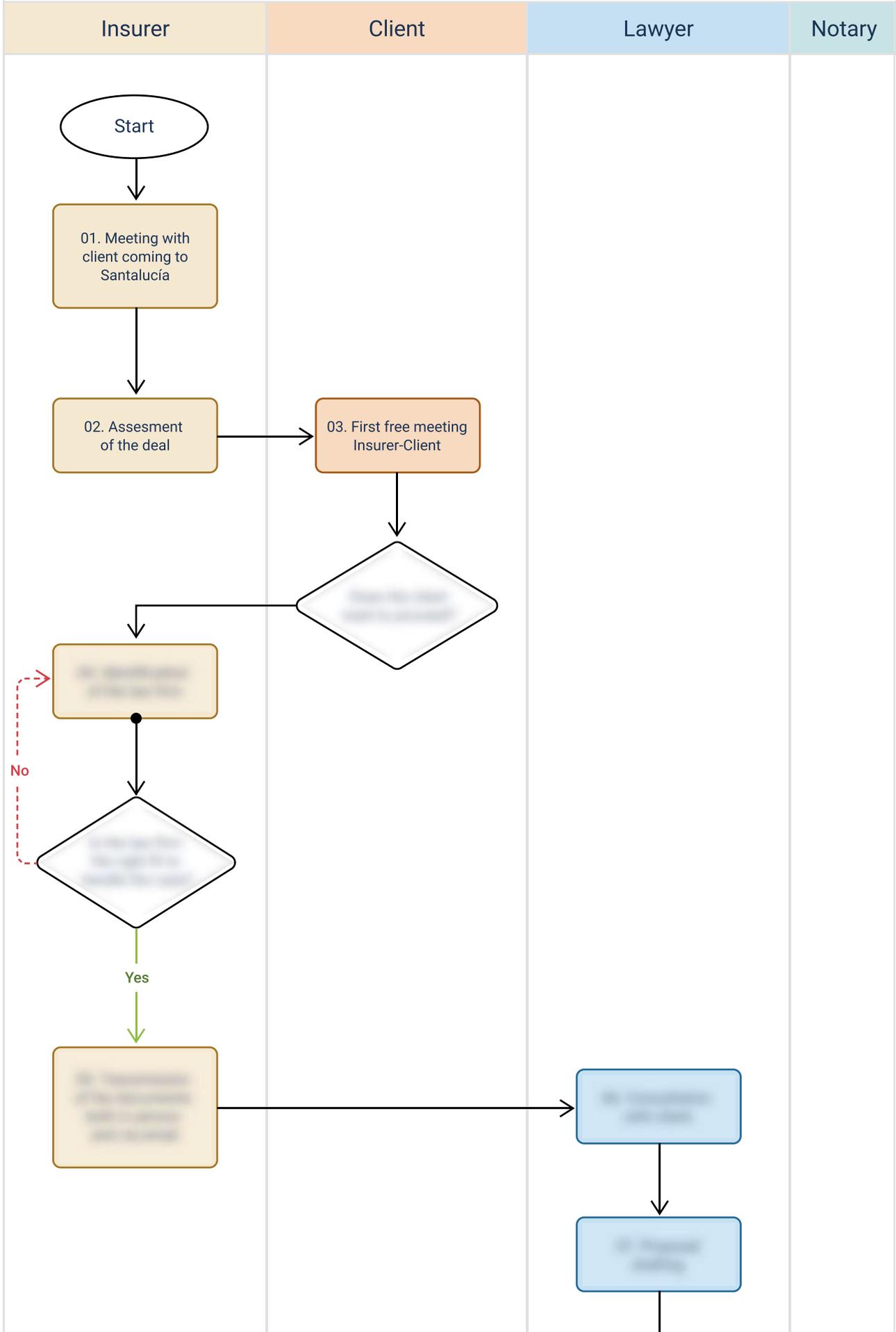
After the session, an updated version of the Visual Process, represented with Business Intelligence tools, was then at the complete disposal of SANTALUCIA to understand in which phases the technology of BIGLE LEGAL could best help.

Visual Process

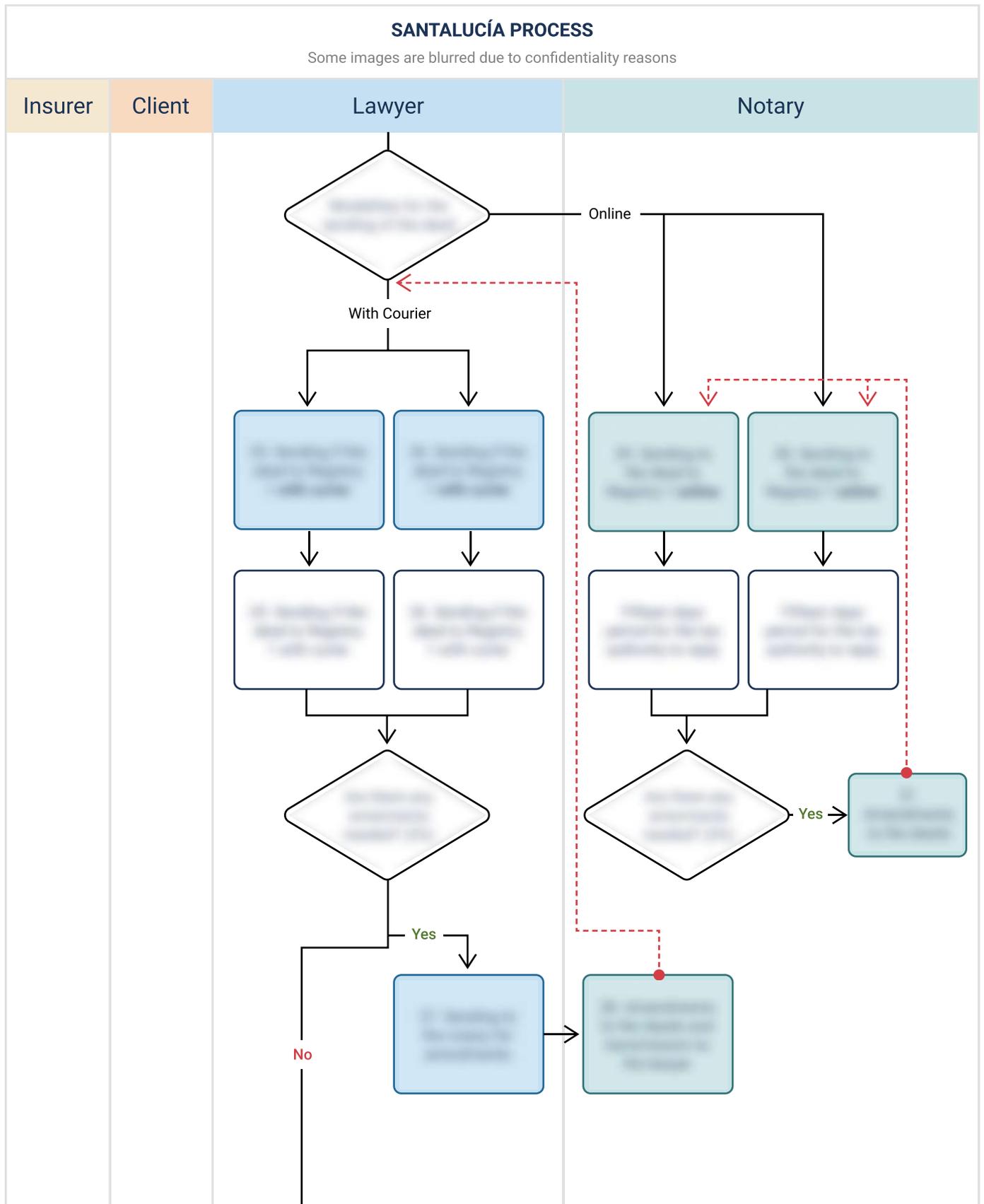


SANTALUCÍA PROCESS

Some images are blurred due to confidentiality reasons



The beginning of the Management of Funeral Insurance, represented as a Visual Process with a swimlane methodology by Sweet Legal Tech. Each column matches a stakeholder in the process (Insurer, Client, Lawyer, Notary).



One of the most difficult parts in the process. Sweet Legal Tech has identified 34 actions items, all accompanied with KPI.

Objectives of the process and KPI mapping:

Improve the time spent in the overall process.

- Lawyer time spent in drafting and reviewing;
- Lawyer time with the client. (e.g. time spent asking for information on the documentation);
- Lawyer time with or by the notary (e.g. the 2 deeds take time to be drafted by the notary; this will lead to delays in the process and in the day of the signature itself).

Minimize errors.

(e.g. errors in public deeds, leading to re-drafting the deed and re-submit the documents to the public registry).

Minimize costs.

(e.g. printing costs, time of professionals, materials costs such as paper, ink, mail envelopes etc).

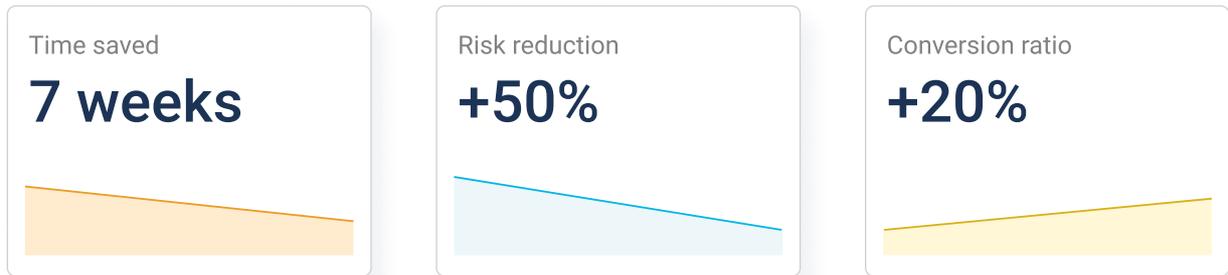
Grant a minimum centralization of documents and processes.

Useful for instance, to: (i) avoid dissemination/loss of information, sensitive information in some cases; or (ii) enhance measures to protect confidentiality and data protection.

Unlock optimization, creation of synergies and erasure of duplicates.

Bigle Legal's Legal Document Management Technology

Thanks to SLT analysis, Bigle Legal could be implemented with 14 templates, all with reusable information capabilities, real time collaboration features so that some sections of the forms could be shared via Link. Finally, for some cases where the documents need to be signed, the Bigle Legal e-signature was activated and just a few clicks away. According to our study, the project would benefit from the following KPI improvements.



“ In times like this, due to health circumstances, digitalisation has become an urgent need for companies, both internally and in the relationship with customers. In our case, the experience with the Bigle Legal platform has been very positive since it has allowed the automation of our main templates, increased productivity, decreased errors and improved the collaboration with our clients.

- Andres Narrillos - Legal Business Development Supervisor and Document Management

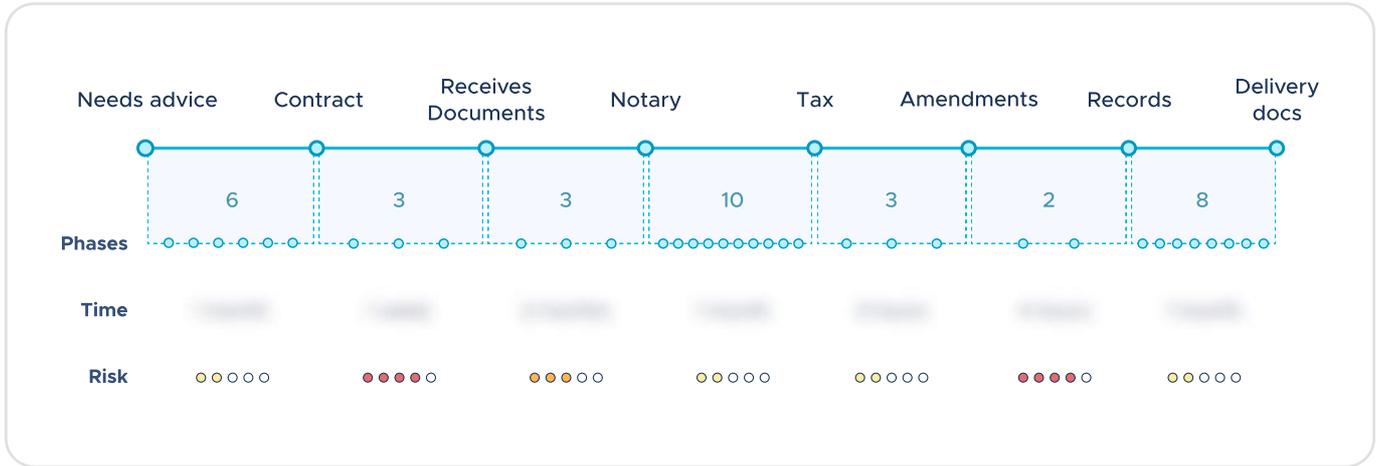
“ The Bigle Legal platform has been extremely powerful in the digitalisation of our services. It will give us greater agility for our professional work, and allow us to improve on services offered.

- Jordi Rubio Garciapons - Lawyer Barcelona office

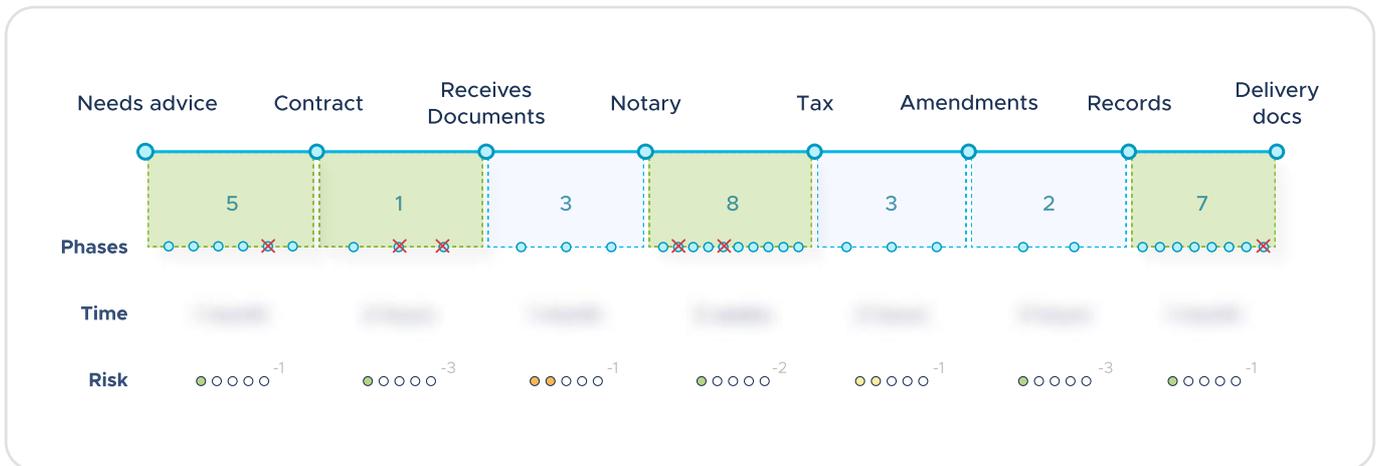
Automation of the drafting phases by Bigle Legal

Probate process - International SOS

Mapping the process prior to Bigle Legal



Automated process with Bigle Legal



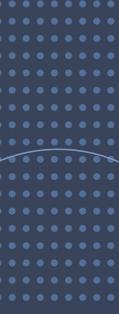
Total Savings

The project is being implemented and pending further confirmation but our study shows **savings potential of € 4,154 per deal**

20 times faster

No risks or unforeseen events

Total control



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