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Case Study: Centralized, User-Friendly Intake and Triage Platform

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Initiatives: Legal Operations and Department Management

Legal leaders can streamline contract review using this case study of LP Building Solutions' cost-effective centralized intake and triage platform. By partnering with IT and using existing technology, the company improved data collection and workload management.



- Company Name: LP Building Solutions
- Industry: Manufacturing
- Headquarters Location: Nashville, Tennessee, U.S.
- Revenue: \$2.58 billion (2023)
- Employees: 4,100 (2023)

Case Overview

Problem

- Requests for legal support on contract-related work are decentralized, coming primarily through individual legal staff's email inboxes. Without centralized intake, legal leaders struggle to make effective decisions about what contract work to do, who should do it and when.
- Legal leaders are under pressure to deliver better metrics on volume and speed of contracting work, but the data needed to support those metrics is currently trapped in individual email inboxes in unstructured and unusable formats.

- Legal departments have little to no budget for technology solutions to support intake and triage. Yet, they still must improve current ways of working to meet business demand, manage workload and deliver metrics to key stakeholders.

Action

To address these common challenges, LP Building Solutions built and deployed a central, business-facing intake and triage solution that includes:

- A partnership between legal and IT to build the solution on existing enterprise technology platforms
- A three-phased approach to soft launch a new platform focused on driving organic growth through a targeted rollout to an initial key user base and rapid action on early feedback
- Embedded, user-friendly process guidance, including a business contract review checklist and prioritization matrix to define roles and responsibilities, streamline contract reviews and set clear expectations on urgency

Results

- In the first three quarters of 2024, legal has collected data from 1,149 requests submitted by more than 150 business partners. Of these requests, 22% are processed using self-service automations built on existing tools.
- Legal is using data to understand volume and trends, manage workload allocation, proactively address frequent offenders of high urgency submissions and drive coaching conversations with legal team members on opportunities to better align risk with the business.

Introduction

LP Building Solutions embarked on this project to tackle two main challenges:

- The absence of a structured process for managing scattered legal support requests, especially within the commercial contracting team
- The deputy general counsel's need for metrics to justify potential investments in a contract life cycle management (CLM) system

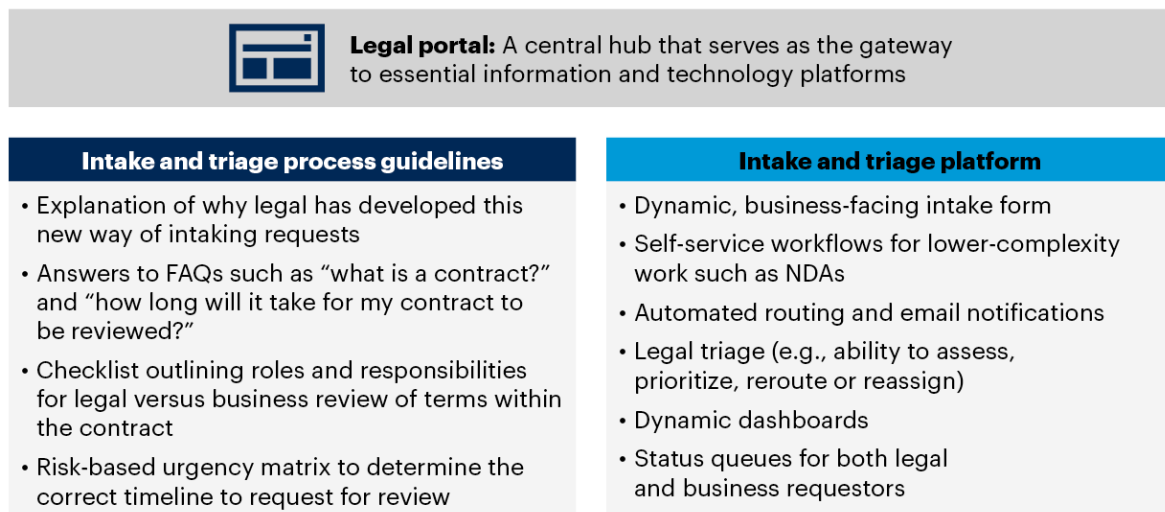
The developed solution addresses these issues by centralizing request intake and triage while also generating crucial data for metrics to guide strategic decisions on workload allocation, prioritization, risk alignment and future technology investments.

The access point for LP Building Solutions’ intake and triage platform is a Microsoft-SharePoint-based legal portal. The legal team developed and continues to maintain the SharePoint landing page without support from IT. Given the scarcity of IT resources, it was important for both resource management and responsiveness for legal to manage this alone.

This landing page serves as the central hub for essential intake and triage process guidelines and the gateway to the business-facing intake and triage platform. For a detailed summary of these solution components, refer to Figure 1.

Figure 1: Intake and Triage Solution Components

Intake and Triage Solution Components



Source: Adapted From LP Building Solutions
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Legal and IT Partnership to Build Intake and Triage System

Legal and IT partnered together to build the new intake and triage system by taking three steps.

Use Existing Enterprise Technology

LP Building Solutions opted to develop its business-facing, contract review legal intake and triage system using existing enterprise technology for several strategic reasons. Primarily, this approach was cost-effective and aligned with the capabilities required for the solution. Furthermore, the technology was already widely adopted across other functions, including IT and accounts payable, ensuring end-user familiarity and ease of integration.

Document Design Requirements Prior to System Configuration

Before approaching IT to configure the system, legal spent six months documenting and refining its design for a future-state intake and triage system. As the final output of this design process, legal provided IT with a comprehensive process map that served as a detailed blueprint for the system's development. A sample of this blueprint is available in the presentation deck.

The strengths of the legal team's system design include the following:

- **Business-friendly language** such as "I need a new contract, SOW or other type of agreement," to make the intake form accessible and easy to navigate for end users
- **Predefined dropdown lists** to enforce standardization in responses, maintain data consistency and reduce the cognitive load for end users
- **Predefined routing criteria** based on specific fields within the intake form such as business unit, type of request, contract value, priority and more to enable workflow automation for routing and notifications
- **Integration with self-service workflows** and automations for lower-complexity tasks, such as nondisclosure agreements, to mitigate the amount of time legal must spend on routine work
- **Clear distinction between substantive legal work and contract administration work** (e.g., eSign, locate and store contracts) to facilitate appropriate and efficient allocation of legal resources and to ensure comparable metric measurement and analytics

“The most helpful thing legal did across the course of our partnership was the process diagram which outlined, in a very formulaic way, how the platform should be built from start to finish.”

— *Brandon Martel, system administrator, digital workplace services, LP Building Solutions*

Delineate Clear Responsibilities for System Configuration and Maintenance

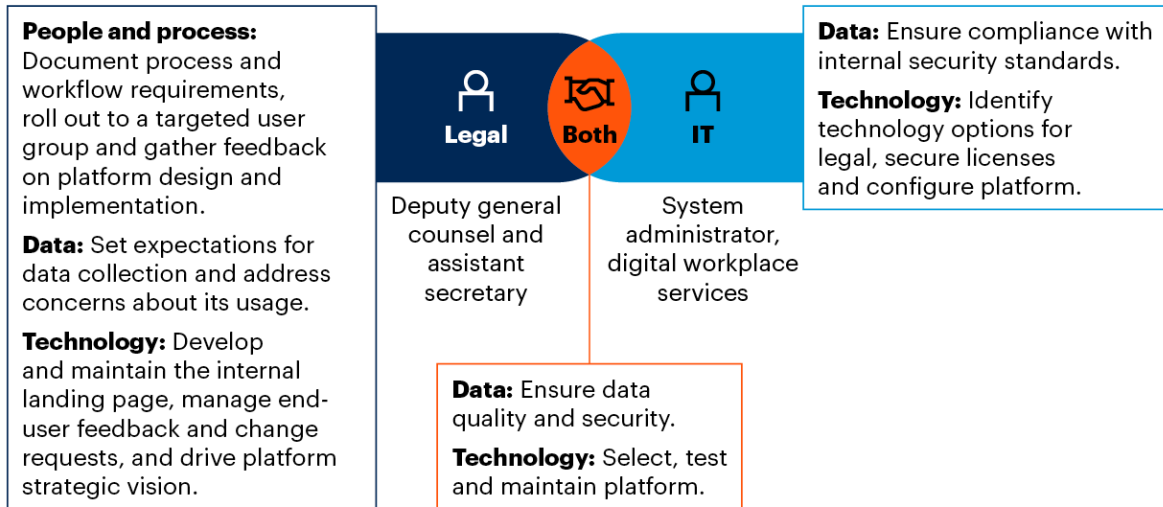
To develop the intake and triage platform, the deputy general counsel (DGC) from legal and the IT system administrator collaborated over a period of one to two months, establishing the foundation for ongoing coordination. Legal primarily managed the design and rollout of the intake and triage system, while IT was responsible for the technical configuration.

The initial setup of the intake and triage system required approximately 50 to 60 hours of IT time. During the configuration phase, legal and IT met frequently to review early iterations, collaborate on testing and resolve issues. Following the system’s deployment, legal and IT now meet on an as-needed basis and primarily manage system maintenance through submission of change request tickets through the IT portal.

On an ongoing basis, data governance responsibilities are shared between legal and IT. Legal manages data collection and maintenance procedures, while IT manages information security procedures to ensure compliance and data security. For a more detailed overview of roles and responsibilities between legal and IT, refer to Figure 2.

Figure 2: Legal and IT Partnership – Roles and Responsibilities

Legal and IT Partnership – Roles and Responsibilities



Source: Adapted From LP Building Solutions 822886_C



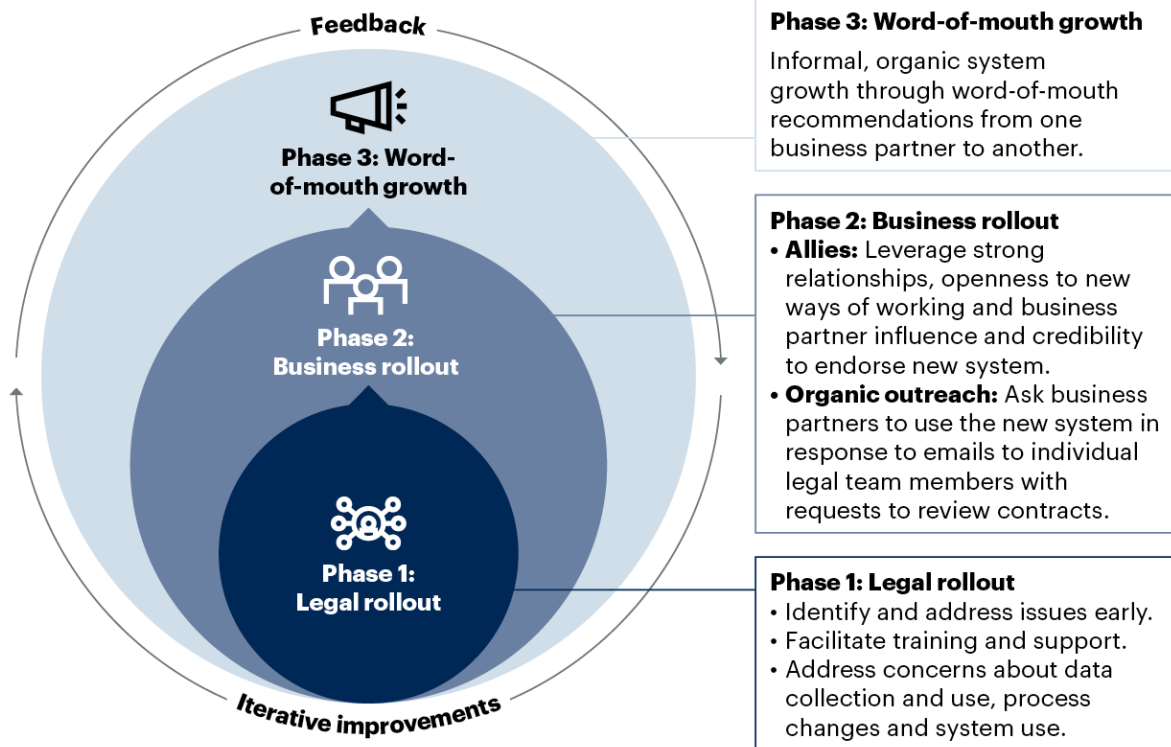
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Three-Phased, Soft Launch Approach

The soft launch, summarized in Figure 3, unfolded in three phases.

Figure 3: Three-Phased Soft Launch Approach

Three-Phased Soft Launch Approach



Source: Adapted From LP Building Solutions
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Roll Out to Legal Users First

Phase one of the launch began with legal users. The project team, consisting of the DGC and IT, engaged legal users early in the rollout to assist with final testing, provide feedback on functionality and familiarize themselves with the system before broader business rollout. This approach allowed legal users to adapt to the new technology while also instilling confidence in the system's usability through training and prompt resolution of identified issues.

As part of the rollout to her legal team, the DGC:

- Proactively sought input on potential barriers to the system implementation and worked swiftly with IT to resolve them.
- Communicated realistic expectations regarding the system's capabilities and limitations.
- Addressed concerns about the collection and use of data from the system.
- Managed apprehension about changes to workflow processes and system usage.
- Set clear expectations and assigned responsibility for system use.

Roll Out to Business Allies Second

Phase two of the system rollout targeted a select group of business partners, often referred to as "allies." These business allies were chosen by the DGC based on their strong working relationships and openness to adopting new methods. Previously, these business partners would reach out to legal via email for contract review support.

As part of the rollout, legal began directing this small group to use the new intake platform and solicited honest feedback on the experience. In collaboration with IT, the DGC rapidly and iteratively refined the system based on business partner feedback to improve user experience. When no changes were deemed necessary, the DGC provided detailed explanations to business partners, outlining the rationale behind the system design, its current functionality and future planned enhancements.

Grow Adoption Through Word of Mouth

The third phase of the system rollout was word-of-mouth growth. Beyond the small group of business allies in phase two, legal has not yet sent formal communications about the platform launch to a broader group of business partners. Through word of mouth, the system has grown organically.

This soft launch approach has been highly successful. In the first three quarters of 2024, more than 150 business partners have submitted over 1,149 requests through the system. Early next year, legal plans to officially roll out the platform to all business partners accompanied by a formal contract review policy.

“By leveraging our existing relationships with key business allies, our soft launch of the system grew organically. Before long, we were receiving review request tickets from individuals with whom we had never previously worked. It’s taken off like wildfire.”

— Heather M. Somers, DGC and assistant secretary, LP Building Solutions

Embedded, User-Friendly Process Guidance

At LP Building Solutions, the process and governance materials surrounding the intake platform are considered just as crucial as the platform itself. The legal portal includes two detailed (and previously undocumented) resources that are essential for facilitating efficient contract review: a business review checklist and a prioritization selection matrix.

Business Review Checklist

To improve efficiency of contract review, the DGC developed a checklist for business contract owners to use before submitting contracts for legal review. This comprehensive checklist includes:

- Guidance on contract mechanics and document hygiene
- Legal versus business terms
- Acceptable business terms
- Annotations

Legal emphasized that completing this prework would expedite the contract review process. For an amended version of this checklist, refer to Figure 4. For the full version of the LP Building Solutions business review checklist, refer to Tool: Business Owner Contract Review Checklist (LP Building Solutions).

Figure 4: Contract Business Review Checklist

Contract Business Review Checklist

Contract mechanics	Business terms
<ul style="list-style-type: none"> <input type="checkbox"/> Parties: Is LP properly identified in the agreement? Acceptable alternatives are: . . . <input type="checkbox"/> Address: Is LP's address current? Our current address is: . . . <input type="checkbox"/> Document format: Unlocked Word document <input type="checkbox"/> Naming convention: ACME CONSULTANTS – Services Agreement (JY edits – 04-22-2024) <input type="checkbox"/> Exhibits and schedules: Are all referenced exhibits and schedules included in the document or available as separate, clearly identified documents? 	<p>Pay particular attention to the business terms in the contract. Some of the more common business terms are listed here but remember that your contract may be different.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Term: Is the term of the contract clearly defined? Does it have a clear start and end date? Does it autorenew? <input type="checkbox"/> Price/quantity: Have you reviewed and are you in agreement with the price? <input type="checkbox"/> ...
Legal terms	
<p>Leave it alone: We don't expect or want business teams to negotiate any of these terms as they involve very complex areas of law. Common examples of contract clauses that should be left to the lawyers are:</p> <ul style="list-style-type: none"> • Representations and warranties • Intellectual property • Confidentiality • Indemnity/indemnification • ... 	

Source: Adapted From LP Building Solutions 822886_C



Prioritization Selection Matrix

Legal developed a prioritization selection matrix to help the business determine what timeline option, on a scale of one to five, to choose when submitting a request.

The matrix assesses the severity of the consequences of a delay on one axis and scope of impact on the other axis.

- **Severity of delay** includes consequences such as money lost, liability incurred, project delays, reputation harm, noncompliance and impact to products, employees or customers.
- **Scope of impact** includes an assessment across the enterprise, line of business, department and individual or team dynamics.

For an amended version of this matrix refer to Figure 5. Refer to Tool: Contract Review Prioritization Matrix (LP Building Solutions) for a full copy of the LP Building Solutions prioritization selection matrix, as well as an editable version.

Figure 5: LP Building Solutions’ Contract Review Prioritization Matrix

CoRT SYSTEM PRIORITIZATION SELECTION MATRIX						
		SEVERITY OF CONSEQUENCES OF DELAY				
		<ul style="list-style-type: none"> • Money lost • Opportunity to drive revenue lost • Liability incurred 	<ul style="list-style-type: none"> • Project delayed • Non-compliance with law/rule/regulation • Reputational harm 	<ul style="list-style-type: none"> • Product quality impact • Impact to employees • Impact to customers 		
		VERY LOW/NONE/INSIGNIFICANT	LOW	MODERATE	HIGH	VERY HIGH/MAJOR
SCOPE OF IMPACT	INDIVIDUAL/TEAM	5 PLANNING: No Specific timeline	4 ROUTINE: In the normal course	4 ROUTINE: In the normal course	3 MODERATE: Sooner rather than later	2 HIGH: This is URGENT
	DEPARTMENT	4 ROUTINE: In the normal course	4 ROUTINE: In the normal course	4 ROUTINE: In the normal course	3 MODERATE: Sooner rather than later	2 HIGH: This is URGENT
	LINE OF BUSINESS	4 ROUTINE: In the normal course	4 ROUTINE: In the normal course	3 MODERATE: Sooner rather than later	2 HIGH: This is URGENT	1 CRITICAL: This is an EMERGENCY
	ENTERPRISE	4 ROUTINE: In the normal course	3 MODERATE: Sooner rather than later	2 HIGH: This is URGENT	1 CRITICAL: This is an EMERGENCY	1 CRITICAL: This is an EMERGENCY



Source: LP Building Solutions

Set Clear Expectations and Consequences for Urgency Designations

Importantly, the legal portal includes a warning for business partners who habitually overdesignate requests as “critical” or “urgent.” Legal sets clear expectations upfront, indicating that if data reveals a consistent pattern of overdesignation (e.g., treating every request as an emergency), business partners may be required to submit urgent requests through their direct supervisors in the future. This measure is a crucial part of the feedback loop and exemplifies how legal is leveraging data from the platform to improve partnership with the business and ensure contracts are prioritized properly throughout the organization.

“With the prioritization selection matrix, I’m helping people appreciate the broader implications of how we determine urgency. Also, by including a managerial feedback loop for situations where a requester consistently requests emergency review, we’re definitely seeing a drop in the emergency review requests resulting from a failure to plan that could have been avoided.”

– Heather M. Somers, DGC and assistant secretary, LP Building Solutions

Results

Driven by a successful soft launch, LP Building Solutions’ contract review intake and triage platform has seen significant adoption. Over 150 business partners are using the solution, and legal has amassed a dataset of more than 1,149 requests submitted in the first three quarters of 2024. The DGC is using this data to:

- Understand volume and trends in contract requests.
- Distinguish between substantive legal work and contract administration work (e.g., eSign, locate and store contracts). Year-to-date, half of the requests submitted by the business were for substantive review and half were for contract administration work.
- Manage work allocation across various legal team members.
- Identify and address risk misalignment between legal and the business.
- Prevent overlawyering on contracts and coach legal team members situationally, especially where the business is comfortable taking more risk than legal.
- Highlight frequent offenders of high-urgency submissions and address them immediately.

“I was stunned by the volume metrics. I knew we were busy, and I knew that everyone was working hard, but to actually see the raw numbers was stunning.”

— Heather M. Somers, DGC and assistant secretary, LP Building Solutions

Moving forward, LP Building Solutions intends to:

- Conduct a retrospective analysis of key performance metrics. As they approach the one-year anniversary of the platform’s launch, the DGC plans to leverage the system’s trending and predictive analysis capabilities to enhance decision-making processes and continuously optimize resource allocation in alignment to broader organizational goals.
- Use data to advocate for a more robust CLM solution in the future. Importantly, the data will also help the legal department identify key stakeholders for defining future CLM requirements.

Evidence

This case study is based on interviews with LP Building Solutions’ Heather M. Somers, DGC and assistant secretary and Brandon Martel, system administrator, digital workplace services.

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[5 Myths About Legal Department Intake and Triage](#)

[Drive Strategic Success Through Business-Driven Legal Intake and Triage](#)

[How to Create Legal Guidance That Improves Business Performance](#)

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